

eWiSACWIS Ongoing Change Order

eWiSACWIS Design and Developer's Guide

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Introduction:

Currently the eWiSACWIS application has Ongoing Planning pages including Family Assessment, Case Plan, and Case Progress Evaluation. The Family Assessment is not required but if completed, it pre-fills into the Case Plan. Case Progress Evaluations are due every 90 or 180 days once the Case Plan is approved.

The Family Assessment & Case Plan (FA&CP) will be combined into one page, which when created, may pre-fill Narrative and Safety information from the Initial Assessment to assist the worker with the Family Assessment. The Family Assessment will no longer record information related to Domains I through V with the associated Elements. The Family Assessment portion of the new Family Assessment & Case Plan will allow users to document current Safety Threats for the family as well as Document Child Functioning, Parent Functioning and Family Functioning Narratives. The Case Plan portion of the Family Assessment & Case Plan allows the worker to enter Case Plan goals and track the provision of services set up to help the Case participants or Family as a whole meet the goals. A list of 24 new case plan services has been compiled for this change order. The previous Family Assessment and Case Plan have now been combined into one page; as a result, there will only be one approval for the page.

Saving a Family Assessment & Case Plan will automatically generate a Safety Assessment & Planning page which will pre-fill with the Safety Threats answered on the Family Assessment & Case Plan. The user will not be able to approve the Family Assessment & Case Plan until the Safety Assessment & Planning has been completed.

Case Progress Evaluations (CPE) will be due 90 days from the approval of the Family Assessment & Case Plan if the Safety Decision on the FA&CP is Unsafe. Case Progress Evaluations will be due 180 days from the approval of the Family Assessment & Case Plan if the Safety Decision on the FA&CP is Safe.

Workers will not have to create new Family Assessment & Case Plan pages to update their plans. The new Case Progress evaluation will copy in all participants and goals from the FA&CP. The user will document the progress and status of goals on the Case Progress Evaluation. They will also have the ability to revise existing goals and insert new goals to the Plan. The approved Case Progress Evaluation essentially will become the working, updated Case Plan.

Saving a Case Progress Evaluation will automatically generate a new Safety Assessment & Planning page which will pre-fill with the Safety Threats answered on the Case Progress Evaluation. The user will not be able to approve the Case Progress Evaluation until the Safety Assessment & Planning has been completed.

The worker will terminate the plan by accessing most recently approved part of the plan (could be the Family Assessment & Case Plan or Case Progress Evaluation) and selecting Terminate under the Options Dropdown.

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Design Assumptions

- Security changes not detailed in the Security Changes section will be done via the online application by Jason Wutt.
- Counties will have the choice to select the Case Progress Evaluation due ticklers created based on Approval dates or Effective dates. It is the responsibility of the State team to provide the development team with information on which tickler the counties will receive.
- Converting Ongoing Case Plans to pending Family Assessment & Case Plans is currently not part of the change. If the state decides to proceed with this type of conversion, additional design and analysis must be completed.
- The SM0801 Ongoing Planning report will be modified. This is the only report that will be updated.

Ongoing Change Order Detailed Design

The Ongoing design includes creating new pages, "Family Assessment & Case Plan" and Case Progress Evaluation to replace the "Family Assessment", "Case Plan" and "Case Progress Evaluation".

As a part of the Ongoing design, the following pages will be added to the system: the Family Assessment & Case Plan page (containing the following tabs: Child Functioning, Parent/Caregiver Protective Capacities, Family Functioning, Tasks & Responsibilities) and the Case Progress Evaluation page (containing the following tabs: Child Functioning, Parent/Caregiver Protective Capacities, Family Functioning, Tasks & Responsibilities, Summary).

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New online page: Family Assessment & Case Plan Page

The screenshot shows a web application window titled "Family Assessment & Case Plan". The interface includes a header bar with "Print", "Spell Check", and "Help" icons. Below the header, a form displays case information: Case Name (Corey Canadian), Case Number (9221592), Effective Date (12/31/2005), Status (Ongoing), Worker Name (Daisy Dan), Approval Date (01/04/2005), and FA&CP Completed (checkbox). The main content area has four tabs: "Child Functioning" (selected), "Parent/Caregiver Protective Capacities", "Family Functioning", and "Roles & Responsibilities". Under the "Child Functioning" tab, there is a "Safety Assessment" section with "Safety Threats" (three statements with Yes/No radio buttons) and a "Children" list (Mary Smith, John Smith, Nathan Smith) with an "Add" button. Below this is a "Child Functioning" text area with pre-filled text. At the bottom, a "Goals" table lists a goal about verbal expression with associated dates and actions (Edit, Delete, Copy Detail). A "Service/Activity" row shows "Emotional SupportSupervision" and "Provider/Responsible Person" "Martha Matthews". The interface concludes with an "Options" dropdown, "Save", and "Close" buttons, and a status bar with "Done" and "Local intranet".

Family Assessment & Case Plan Page Overview

The Family Assessment & Case Plan page is accessed via Create > Case Work > Ongoing Services > Family Assessment & Case Plan.

The Family Assessment & Case Plan page is made up of the following four tabs: Child Functioning, Parent Caregiver/Protective Capacities, Family Functioning, and Tasks & Responsibilities. The worker may access templates under the Options dropdown field from any tab. The Approval option appears under the Options dropdown on the Child Functioning Tab.

When the page is initially saved, a Safety Assessment & Plan record is automatically created with the safety threats pre-filled from the Family Assessment & Case Plan. When the worker attempts to approve the page, and the "Safety Assessment & Plan completed" checkbox on the associated Safety Assessment & Plan has not been checked, the user will receive a validation message "The Family Assessment & Case Plan cannot be approved until the associated Safety Assessment & Plan is complete." "Not Approve" is currently the only Approval option available. Continue?"

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Templates

Two new templates must be created for the Family Assessment & Case Plan Page:

1. Family Assessment, Case Plan & Safety Assessment template
2. Case Plan Summary template

Both of these templates can be launched from any tab on the page.
See template mapping documents for details on the templates.

Family Assessment & Case Plan Header Information

The Family Assessment & Case Plan Header displays basic identifying information about the Case, Worker creating the page, the Effective Date and the Approval Date. The system will pre-fill each field except for the Effective Date field which is a required user entered date field.

Header Information

Box: Family Assessment & Case Plan

Fields:	Case Name:	Field displaying the full case name (Last Name, First Name MI.) Name pre-fills from the Case Header on Maintain Case page; Read only.
	Worker Name:	The full name (Last Name, First Name, MI., Suffix) of the worker who initially created the Family Assessment & Case Plan (id_cr); System derived from the Worker Table. Read Only;
	Case Number:	Case ID; Read Only; System Derived.
	Approval Date:	The date the Family Assessment & Case Plan receives supervisory approval; Read Only; System Derived.
	Effective Date:	User entered date represents the date the Plan goes into effect. Required. Editable until final approval. Date can be backdated up to 180 days. Date cannot be future dated.
	Status:	Status of Family Assessment & Case Plan; System Derived; Not Editable; Read Only. Defaults to 'Pending' when work is created.
	FA& CP Completed:	This checkbox triggers the system to run validation edits on the page upon 'Save'. The checkbox is 'checked' upon 'Approval'. This allows the worker to save the page without completing all fields.

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Child Functioning Tab

The screenshot shows the 'Family Assessment & Case Plan' window. At the top, there are tabs for 'Child Functioning', 'Parent/Caregiver Protective Capacities', 'Family Functioning', and 'Roles & Responsibilities'. The 'Child Functioning' tab is active. Below the tabs, there is a header section with case information: Case Name: Corey Canadian, Case Number: 9221592, Effective Date: 12/31/2005, Status: Ongoing, Worker Name: Daisy Dan, Approval Date: 01/04/2005, and FA&CP Completed: ☐. The main content area is divided into several sections. The 'Safety Assessment' section includes 'Safety Threats' with three statements and 'Yes/No' radio buttons. The 'Children' section has a list of children: Mary Smith (selected), John Smith, and Nathan Smith, with an 'Add' button. The 'Child Functioning' section has a text area for describing the child's general functioning and effects of any maltreatment. The 'Goals' section includes a goal statement, a table with 'Begin Date' and 'Target End Date', and a table with 'Service/Activity' and 'Provider/Responsible Person'. At the bottom, there are 'Options', 'Save', and 'Close' buttons.

Family Assessment & Case Plan

Print Spell Check Help

Family Assessment/Case Plan

Case Name: Corey Canadian Case Number: 9221592 Effective Date: 12/31/2005 Status: Ongoing
Worker Name: Daisy Dan Approval Date: 01/04/2005 FA&CP Completed: ☐

Child Functioning Parent/Caregiver Protective Capacities Family Functioning Roles & Responsibilities

Safety Assessment

Safety Threats

Child shows effects of maltreatment, such as serious symptom and lack of behavioral control. ☐ Yes ☒ No
Child is fearful of home situation. ☐ Yes ☒ No
Child shows effects of maltreatment such as serious physical symptoms. ☐ Yes ☒ No

Children

☒ Mary Smith
☐ John Smith
☐ Nathan Smith

Add

Child Functioning

Describe the child's general functioning and effects of any maltreatment.

Pre-fills from IA-PC, IA Narrative, or most recent FA/CP or CPE.

Goals

Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.

Begin Date: 01/05/2006 Target End Date: 01/05/2006 [Edit](#) [Delete](#) [Copy Detail](#)

Service/Activity: Emotional SupportSupervision Provider/Responsible Person: Martha Matthews

Options:

Done Local intranet

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Tab Overview

The Child Functioning Tab is the default tab. If an Initial Assessment was selected on the Assessment Selection pop-up, the page pre-fills with safety threats, participants identified as children and their corresponding Child Functioning Narratives (from IA-PC or IA Narrative only). The Safety Assessment Expando is expanded by default and safety threats are pre-filled the way they were answered on the Assessment. If no Assessment was selected, the safety threats will not pre-fill. The Children box pre-fills with the full names of children on the Initial Assessment selected to pre-fill. When a child is selected the Child Functioning Narrative and Goals are refreshed and show data for the selected person. The Child Functioning narrative pre-fills with the narrative entered on the selected Initial Assessment. When the page is first created the Goals box will be empty. Clicking the insert button will open the Goal Detail page. When the worker returns from the Goal Detail Page the Goal Narrative, Begin Date, Target End Date, Service/Activity and Provider/Responsible Person information will display in read only mode and will sort by "Begin Date".

The "Family Assessment, Case Plan & Safety Assessment" and "Case Plan Summary" templates and Approval option are available under the Options dropdown.

Child Functioning Tab Information

Expando: Safety Assessment

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Default view is expanded when page is opened.

Box: Safety Threats

Fields: Child shows effects of maltreatment, such as serious emotional symptoms and lack of behavioral control:

Safety Threat. Yes, No radio Buttons. If page is created from a selected Initial Assessment, Yes or No radio button pre-fills with answer from Safety Assessment associated with the (Initial Assessment Primary Caregivers or Initial Assessment Narrative). If no Initial Assessment was selected to create the page, Yes and No are blank and the corresponding field in the Safety Assessment question fills with "N/A"(the "N/A" will display on a database field and will not display as an online field). Radio buttons are user editable, and not required until the worker approval is entered. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Child is fearful of home situation:

Safety Threat. Yes, No radio Buttons. If page is created from a selected Initial Assessment, Yes or No radio button pre-fills with answer from Safety Assessment associated with the (Initial Assessment Primary Caregivers or Initial Assessment Narrative). If no Initial Assessment was selected to create the page, Yes and No are blank and the corresponding field in the Safety Assessment question fills with "N/A"(the "N/A" will display on a database field and will not display as an online field). Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Child shows no effects of maltreatment such as serious physical symptoms:

Safety Threat. Yes, No radio Buttons. If page is created from a selected Initial Assessment, Yes or No radio button pre-fills with answer from Safety Assessment associated with the (Initial Assessment Primary Caregivers or Initial Assessment Narrative). If no Initial Assessment was selected to create the page, Yes and No are blank and the corresponding field in the Safety Assessment question fills with "N/A"(the "N/A" will display on a database field and will not display as an online field). Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING table.

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Box: Children

Fields: Child Name:

Name of Child in a repeating group with a radio button in the column to left of the name. Child's name is displayed in following format: (Last Name, First Name MI., Suffix). Repeating group rows pre-fill with the names of participants in the "Child Information" box of the "Part. Info" tab of the Initial Assessment (Primary Caregivers or Narrative), if an Assessment was selected to create the FA&CP. If no Assessment was selected to create the FA&CP, the repeating group is empty on initial creation of the page. First child in the repeating group is selected by default. When a radio button is selected the Child Functioning Narrative and Goals for that child are displayed.

Button: Add/Edit:

Opens the Case Participants pop-up for user to add or remove participants from the box. Only active case participants are available for selection. Always enabled on an editable page.

Box: Child Functioning

Fields: Describe the child's general functioning and effects of any maltreatment:

User-entered comments field. Always enabled and required. If Assessment was used to create the FA&CP, on creation of the page the field pre-fills text from the Child Functioning Tab of the Initial Assessment (Primary Caregivers or Narrative) for the child selected in the Children box. Saves to the DOC_NARRATIVE Table; 50,000 character limit.

Box: Goals

Repeating Group 1

Fields: Goal:

The Goal entered on the Case Plan Goal page. "Goal" label is within the field. System Derived; View Only; Height expands based on length of goal.

Begin Date:

The Begin Date entered on the Case Plan Goal page. "Begin Date" label is within the field. Not Required. Read Only; System Derived. Format MM/DD/YYYY.

Target End Date:

The Target End Date entered on the Case Plan Goal page. "Target End Date" label is within the field. Not Required. Read Only; System Derived; Format MM/DD/YYYY.

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Links:

Edit This Edit link appears next to each editable Goal. This link launches the Case Plan Goal Page. When the FA&CP has been approved, the Edit link will be replaced by a View link.

Delete This Delete link appears next to each editable Goal. This link deletes the goal and all associated services/activities, providers, service/activity explanations. When Delete is clicked, the user will receive the following message. "This will delete the Goal with any documented Services/Activities and Providers. Continue?" When the FA&CP has been approved, the Delete link will be removed.

Copy Detail: This Copy Detail link opens the Goal Copy page so the user can copy the Goal to another participant in the Children Box. When the FA&CP has been approved, the Copy Detail link will be removed.

Nested repeating group: **Displays all Services and Providers for the Goal. Sorted Ascending by Service/Activity field. Can have many rows for each Goal.**

Fields:

Service/Activity: Displays Service/Activity entered on the Case Plan Goal Page. Read Only; System Derived; First column in nested repeating group table.

Responsible Person/Provider: Displays Responsible person/provider entered on the Case Plan Goal Page. System Derived; View Only; Second column in nested repeating group table.

Buttons:

Insert: Opens an empty Case Plan Goal page. Enabled until the FA&CP is approved.

Page Buttons:

Save: Standard save processing.

Close: Standard close processing.

Background Processing:

- If a 'Pending' Family Assessment & Case Plan exists for the case, the user will not be able to create a new Family Assessment & Case Plan. The following message will be generated: **"A Pending Family Assessment & Case Plan exists for the specified case. Please access it via the Cases outliner"**

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- If the user attempts to create a new Family Assessment & Case Plan for a case with an ‘Ongoing’ Family Assessment & Case Plan on record, the following message will be displayed: **“An Ongoing Family Assessment & Case Plan exists for the specified case. Create a Case Progress Evaluation to update the Ongoing plan”**.
- When user creates the FA&CP from the create case work page, the system looks up any Initial Assessment Primary Caregivers (IA-PC) or Initial Assessment Narratives (IA-N) approved within the last 180 days (180 days from current date). If any IA-PCs or IA-Ns are found, then the Initial Assessment Selection pop-up is displayed. If a user selects an assessment to pre-fill from, when the FA&CP opens, the following data is pre-filled into the FA&CP:
 1. The Safety Threats are answered with the same answers as they contained on the Safety Assessment associated with the Initial Assessment. (Note: IA-Narrative may not have safety assessment to pull from. If so, safety threats are blank.)
 2. Child names pre-fill into the Children group box for every child on the Assessment.
 3. Child Functioning narratives from the Assessment pre-fill to the Child Functioning group box for each child on the Assessment.**NOTE:** These pre-fills only occur upon creation of the FA&CP. Once the page is created, the data does not pre-fill again when the page is re-accessed.
- If no approved IA-PCs or IA-Ns are found within the last 180 days, the following message is displayed: "There are no approved Initial Assessments in the last 180 days. Do you want to continue?" (Yes/No) Clicking ‘Yes’ will open the Family Assessment & Case Plan with no pre-filled information. Clicking ‘No’ will return the worker to the eWiSACWIS Desktop.
- When the worker clicks the Insert button to add the first goal, the following message is displayed: “This will save the Family Assessment & Case Plan information. Do you want to continue?” Selecting ‘Yes’ saves the Family Assessment & Case Plan and takes the worker to the Case Plan Goal Item page. Selecting ‘No’ returns the worker to the Case Plan page and the case plan is not saved yet.
- If the Family Assessment & Case Plan has not yet saved the most recent changes, when the worker selects the Copy detail hyperlink for a participant, the following message is launched before the Goal Copy page is opened: “This will update and save the Case Plan. Do you want to continue?”
- Clicking Delete in the Goals box will throw a Delete Confirmation message “This will delete the Goal with any associated Services/Activities and Providers. Continue? (Yes/No)” If ‘Yes’ = deletes the goal and services from the Goal box (Commit to database, i.e., the deletion of the goal and services, only occurs by clicking ‘Save’ on the page). If ‘No’ = returns the user to the page without deleting the Goal.

APPROVAL LOGIC

- When the user accesses Approval in the Options dropdown and clicks the Go Button, the system will perform the following logic:
 1. Verify if page has been saved and a Safety Assessment & Planning page was created:
 - If FALSE, display message "The Family Assessment & Case Plan cannot be approved until the associated Safety Assessment & Plan is complete. "Not Approve" is currently the only Approval option available. Continue?"

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- If TRUE, retrieve value from SAFETY_ASMNT_PLANNING.fl_complete.
 - i. IF = Y; allow user through to the Approval History page for the FA&CP (Approve & Not Approve available as options)
 - ii. IF = N, display message, "The Family Assessment & Case Plan cannot be approved until the associated Safety Assessment & Plan is complete." "Not Approve" is currently the only Approval option available. Continue? (YES /NO) Approve Option is disabled, Not Approve is enabled.
- Clicking the Approve radio button on the FA&CP's Approval History Page will automatically check the FA&CP Completed checkbox to force the page validations, when Save button is eventually clicked.
- There are five plan status values for the Family Assessment & Case Plan: *Pending* (once a plan is created and prior to supervisory approval); *Ongoing* (Once a plan is approved by a supervisor); *Historical* (Once a supervisor approves a new Case Progress Evaluation when an ongoing plan exists); *Terminated* (When a plan is specifically terminated by the user); and *Not Approved* (When a worker or supervisor selects 'Not Approve' on a plan during the approval process).
- Not Approving the FA&CP will "Not Approve" the associated Safety Assessment & Planning record (the SA&P box must be 'checked').
- Approving the FA&CP will also approve the associated Safety Assessment & Planning record (the SA&P box must be 'checked').
- After the Family Assessment & Case Plan is approved, Terminate appears in the Options dropdown.

Save Processing:

- Required field validations will not be processed until the user clicks the FA&CP Completed checkbox. When the user selects the FA&CP Completed checkbox and clicks the Save button, the page edits will run against all required fields for all tabs and all participants. If the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab contains more than one participant the system will validate required narrative fields for each participant.
- There is no requirement for a minimum number of children or parents to be added to the FA&CP.
- There is no requirement for a minimum number of goals when the page is validated. The worker can insert a participant without adding a goal.
- Safety Threats will be validated only after the user has selected the FA&CP Completed checkbox. Users will receive the following message when any of the Safety Threats have not been answered: "Please enter data in the fields which are highlighted - <name of tab> Tab. One or more of the Safety Threat questions have not been answered".
- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'
- On the initial save of the page, a Safety Assessment & Planning record is created and displayed on the outliner and linked to the Family Assessment & Case Plan. Safety Threats on the FA&CP page will save to the Safety Assessment Table. The user receives the following message, "A Safety Assessment & Planning record will be created and linked to this Family Assessment & Case Plan". ("OK" button will display)"

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- If a user changes the answer to one of the safety threats after the associated Safety Assessment & Planning has been completed, the following message will be displayed: "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan."
- If a safety threat on the FA&CP is changed after the Safety Assessment & Planning has been completed, and the user goes directly to the Approval after making the change, the system will allow the user to access the Approval page and select 'Approve' without giving them a validation message. When the user attempts to save the base page in this particular scenario, they will receive the following message, "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan." The approval request will not go through.

Pop-up - Initial Assessment Selection

Initial Assessment Selection

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Print Spell Check Help ?

To pre-fill your Family Assessment & Case Plan (FA&CP) with safety threats and narrative fields, please click the Select link adjacent to the appropriate Initial Assessment. To proceed to the FA&CP without pre-filling, click the Create button.

Initial Assessments

Date Created	Date Approved	Assessment Result	
08/02/2005 13:15:49	08/07/2005 12:21:25	Unsubstantiated	Select
05/02/2005 14:22:33	05/12/2005 09:45:55	Substantiated	Select

Create Close

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Pop-up Overview

The Initial Assessment Selection pop-up allows workers to select an Initial Assessment - Primary Caregivers or Initial Assessment - Narrative to use for pre-filling the Safety Threats with the same answers as they contained on the Safety Assessment associated with the selected Initial Assessment. (Note: IA-Narrative may not have safety assessment to pull from. If so, safety threats are blank.) Additionally, child names and parent names pre-fill into the Children and Parent/Caregiver group boxes on the FA&CP for every child on the Initial Assessment. Child Functioning, Parent/Caregiver Protective Capacities, and Family Functioning narratives pre-fill from the selected Initial Assessment to the FA&CP.

NOTE: These pre-fills only occur upon creation of the FA&CP. Once the page is created, the data does not pre-fill again when the page is re-accessed.

The worker is presented with the approved Initial Assessment - Primary Caregivers records or Initial Assessment - Narrative records that have a supervisory approval within the last 180 days. The worker can click the Select link to pre-fill the data into the Family Assessment & Case Plan. If the worker does not want to use an Initial Assessment to pre-fill, they can click the Create button and a blank FA&CP page will open. If the user does not want to continue creating the FA&CP, they will click the Close button.

Pop-up Information

Text Instructions (appear above Initial Assessments group box):

Displays following text: "To pre-fill your Family Assessment & Case Plan (FA&CP) with safety threats and narrative fields, please click the Select link adjacent to the appropriate Initial Assessment. To proceed to the FA&CP without pre-filling, click the Create button."

Box: Initial Assessments

Repeating Group:

Fields:

Date Created:	Displays the date that the Initial Assessment was created; read only; system derived.
Date Approved:	Displays the date that the Initial Assessment received supervisory approval; read only; system derived.
Assessment Result:	Displays the Assessment Result for the Initial Assessment record; retrieved from the INVESTIGATION.cd_invs_vldtn field; read only; system derived.

Links: Select: This link opens a new Family Assessment & Case Plan page with pre-filled data from the Initial Assessment.

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Buttons:

Create:	This button opens a new Family Assessment & Case Plan without pre-filling any data from an Initial Assessment.
Close:	This button returns the user to eWiSACWIS Desktop without saving any changes.

Background Processing:

- When a worker creates the Family Assessment & Case Plan, the system will search for the case's Initial Assessments (Initial Assessment - Primary Caregivers and Initial Assessment Narratives only) that were approved in the last 180 days. If Initial Assessment records are found, the Initial Assessment Selection pop-up opens. Each record that is found will be displayed with the Date Created, Date Approved, Assessment Result and a Select hyperlink.
- If no records are found, the following message is displayed: "There are no approved Initial Assessments in the last 180 days. Do you want to continue?" (Yes/No). Clicking 'Yes' will open the Family Assessment & Case Plan with no pre-filled information. Clicking 'No' will return the worker to the eWiSACWIS Desktop.

Save Processing:

N/A

Pop-up - Case Participants

Select	Person Name	DOB
<input checked="" type="checkbox"/>	Smith, John	01/01/1999
<input checked="" type="checkbox"/>	Smith, Mary	02/03/2000
<input type="checkbox"/>	Smith, Nathan M Jr.	09/20/1997

Pop-up Overview

The Case Participants pop-up allows workers to add and remove participants from the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab. Name and Date of Birth are displayed for each participant.

When the Add/Edit button on the Child Functioning Tab is clicked, the Case Participants pop-up displays all case participants who are currently in the Children group box with the Select checkbox checked. Other Case participants not currently on the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab appear without the checkbox selected. Those participants without the checkbox select can be selected (checked) as additional participants on their respective tab. Those participants with a check in the checkbox can be removed (unchecked) from their respective tab.

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Pop-up Information

Box: Case Participants-Children

Fields: Select: Checkboxes corresponding to each person in the list. Checked for participants in the Children box of the FA&CP. Unchecked for participants not in the Children box. When selected or deselected, Continue button is enabled.

Person Name: Names of Participants in the Children box and names of other Participants on the case who are not on the Parenting Practices Tab. Format. System derived, view only. (Last Name, First Name MI., Suffix).

DOB: Date of Birth of Case participant System derived, view only. (DD/MM/YYYY)

Buttons:

Continue: Transfers Participants to the Child Functioning Tab. Enabled when any participant is selected or deselected.

Close: Returns the user to the Child Functioning Tab without saving any changes.

Background Processing:

- When a Case Participant is selected and the Continue button is clicked, that participant is added to the Children group box of the Child Functioning Tab as well as adding the narrative field for the participant.
- If the person's age is greater than 18, the worker receives a warning message stating: "One or more case participants that are over 18 years of age have been selected as children. Do you wish to keep the selection?" (Yes/No). Clicking 'Yes' will add the newly selected participant(s) to the Children box. If a participant does not have Date of Birth, there is no edit to determine if he/she is a child.
- When a Case Participant is de-selected and the Continue button is clicked, the participant is removed from the Children group box of the Child Functioning Tab.
- When a person is removed from the list and Continue button is clicked. "One or more children have been removed from the list. The Child Functioning Narrative and Goals will be lost for each removed participant. Continue?" (Yes/No). Clicking 'Yes' will remove the deselected participant(s) from the Children box.

Save Processing:

N/A

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Pop-up - Goal Copy

Case Participants		
	Name	DOB
<input type="checkbox"/>	Smith, John	
<input type="checkbox"/>	Smith, Nathan	10/18/2005

Save Close

Pop-up Overview

The Goal Copy pop-up opens when the user clicks the Copy Detail link in the Goals Group box. The pop-up displays the name and date of birth of case participants who are in the Children group box of the Child Functioning Tab.

When a participant is selected and the Save button is clicked, an identical goal is copied to the selected person. Goals can be copied to multiple participants at the same time.

Pop-up Information

Box: Case Participants-Children

Fields: Checkbox: Checkboxes corresponding to each participant in the Children box of the FA&CP. When checked, Save button is enabled.

Person Name: Names of Participants in the Children box System derived, view only. Format: (Last Name, First Name MI., Suffix).

DOB: Date of Birth of Case participant System derived, view only. (DD/MM/YYYY)

Buttons:

Save: Copies Goal to selected Participants. Becomes enabled when any participant is selected.

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Close: Returns the user to the Child Functioning Tab and the copied goals are displayed in the Goals group box. Prompts for save if page has changed without being saved.

Background Processing:

- Selected checkboxes are disabled after the Save button is clicked.
- Only Participants from the current tab are displayed in the Goal Copy pop-up.
- When the user clicks the Close button they are returned to the Child Functioning Tab.

Save Processing:

- When a Case Participant is selected and the Save button is clicked, the Goal (Goal, Services, Providers) on the Child Functioning Tab for which the Copy Detail link was clicked is copied to participants selected on the pop-up.
- Save processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

Pop-up - Terminate Plan

Terminate Plan -- Web Page Dialog

eWiSACWIS Print Spell Check ABC Help ?

Plan Termination

Reason Plan is no Longer Required:

Other Reason Plan is no Longer Required:

Options: Go Save Close

Pop-up Overview

The Terminate Plan pop-up page is used to terminate an 'Ongoing' Family Assessment & Case Plan, thereby ending the family's involvement in the current Family Assessment & Case Plan/Case Progress Evaluation process. If a new Family Assessment & Case Plan is created following the termination, the new plan follows processing of creating new plan (i.e., pre-fills IA,-PC, IA-N).

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The Terminate Plan page is accessed by selecting the Terminate option in the Options dropdown field on the Child Functioning Tab of the Family Assessment & Case Plan page, and then by clicking the Go button. The Terminate selection in the Options dropdown field will only be visible for 'Ongoing' Case Plans.

Upon activating this pop-up page, the user must select a reason that the Case Plan is no longer required. If the user selects a value of 'Other' from the "Reason Plan is no Longer Required" dropdown field, the "Other Reason Plan is no Longer Required" text field is enabled and required. If the user selects a value apart from 'Other' from the "Reason Plan is no Longer Required" dropdown field, the "Other Reason Plan is no Longer Required" text field is disabled and not required.

To receive approval for the Case Plan termination, the user selects the Approval option in the Options dropdown field, and then clicks the Go button, which launches the Approval History page). A case plan cannot be terminated unless supervisory approval for termination has been granted.

The termination of the plan cannot be "Not Approved" by either worker or supervisor. The "Not Approve" radio-button on the Approval History page for case termination is disabled. If the termination process was initiated by mistake it should be approved and a new plan will need to be created

Pop-up Information

Box: Plan Termination

Fields: Reason Plan is no Longer Required: User-selected dropdown field.
User-editable; required. If the "Other" value is selected, the 'Other Reason Plan is no Longer Required' text field is enabled.

Other Reason Plan is No longer Required: User-entered text field.
Enabled and required if the "Other" value is selected from the Reason Plan is no Longer Required dropdown field. User-editable when enabled.

Buttons:

Save: Standard Save processing.
Close: Standard Close processing. Returns the worker to the Family Assessment & Case Plan page.

Background Processing

- The user will select a reason for terminating the plan.
- If the user selects a value of 'Other' from the 'Reason Plan is no Longer Required' dropdown field, the 'Other Reason Plan is no Longer Required' text field is enabled and required.
- If the user selects a value other than 'Other' from the 'Reason Plan is no Longer Required' dropdown field, the 'Other Reason Plan is no Longer Required' text field is disabled and not required.

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- If the worker attempts to save the page without answering required fields, an error message will display stating “Please enter data in fields which are highlighted. - <tab name> tab - <field name>”
- Upon supervisory approval of the plan termination, the Case Progress Evaluation tickler will be deleted.
- Upon supervisory approval of the plan termination, the FA&CP status changes to Terminated.

Save Processing

1. Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if s/he would like to ‘Save changes before closing the page.’

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Parent/Caregiver Protective Capacities Tab

The screenshot shows a web application window titled "Family Assessment & Case Plan". The interface includes a header bar with "Print", "Spell Check", and "Help" icons. Below the header, a form displays case information: Case Name (Corey Canadian), Case Number (9221592), Effective Date (12/31/2005), Status (Ongoing), Worker Name (Daisy Dan), Approval Date (01/04/2005), and FA&CP Completed (checkbox). A tabbed interface shows four tabs: "Child Functioning", "Parent/Caregiver Protective Capacities" (selected), "Family Functioning", and "Roles & Responsibilities". Under the selected tab, there is a "Safety Assessment" section with a "Safety Threats" list. Each item in the list has "Yes" and "No" radio buttons. Below this, there is a "Parents/Caregivers" section with a dropdown menu showing "Lisa Smith" and a "Parent/Caregiver Protective Capacities" section with a text area for describing adult functioning. At the bottom, there are "Options:" dropdown, "Go" button, "Save" button, and "Close" button. The status bar at the very bottom shows "Done" and "Local intranet".

Family Assessment & Case Plan

Print Spell Check Help

Family Assessment/Case Plan

Case Name: Corey Canadian Case Number: 9221592 Effective Date: 12/31/2005 Status: Ongoing
Worker Name: Daisy Dan Approval Date: 01/04/2005 FA&CP Completed: ☐

Child Functioning **Parent/Caregiver Protective Capacities** **Family Functioning** **Roles & Responsibilities**

Safety Assessment

Safety Threats

One or both parents / caregivers cannot control behavior. ☐ Yes ☒ No
One or both parent / caregivers are violent. ☐ Yes ☒ No
One or both parent / caregivers have failed to benefit from previous professional help. ☐ Yes ☒ No
There is some indication parents / caregivers may flee. ☐ Yes ☒ No
One or both parents / caregivers intend(ed) to hurt the child and do not show remorse. ☐ Yes ☒ No
Maltreating parent / caregiver exhibits no remorse or guilt. ☐ Yes ☒ No
Child has exceptional needs which parent / caregiver cannot / will not meet. ☐ Yes ☒ No
No adult in the home will perform parental duties and responsibilities. ☐ Yes ☒ No
One or both parent / caregivers fear they will maltreat child and / or request placement. ☐ Yes ☒ No
One or both parent / caregivers lack knowledge, skill, motivation in parenting which affects the child's safety. ☐ Yes ☒ No
Child is perceived in extremely negative terms by one or both of the parents / caregivers. ☐ Yes ☒ No
Child is seen by either parent / caregiver as responsible for the parent's / caregiver's problems. ☐ Yes ☒ No
Parents / caregivers do not have resources to meet basic needs. ☐ Yes ☒ No
Living arrangements seriously endanger the physical health of the child. ☐ Yes ☒ No

Parents/Caregivers **Parent/Caregiver Protective Capacities**

☒ Lisa Smith Describe how adult functioning (general functioning, daily life management, mental health functioning and substance use) impacts parenting practices (disciplinary approaches, nurturing, limit setting)

Options: Go Save Close

Done Local intranet

eWiSACWIS Ongoing Change Order

Family Assessment & Case Plan

Print Spell Check Help

Family Assessment/Case Plan

Case Name: Corey Canadian Case Number: 9221592 Effective Date: 12/31/2005
 Worker Name: Daisy Dan Approval Date: 01/04/2005

Child Functioning Parent/Caregiver Protective Capacities Family Functioning Roles & Responsibilities

Safety Evaluation

Parents/Caregivers

☒ Lisa Smith
☐ John W. Smith Sr.

Parent/Caregiver Protective Capacities

Describe how adult functioning (general functioning, daily life management, mental health functioning and substance use) impacts parenting practices (disciplinary approaches, nurturing, limit setting, protectiveness, provision of basic care, etc.). When a child is unsafe, determine how diminished parent/caregiver protective capacities impact impending danger threats (foreseeable danger) to safety.

Pre-fills from IA-PC, IA Narrative, or most recent FA/CP or CPE.

Goals

Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.	Begin Date: 01/05/2006	Target Date: 01/05/2006	Edit Delete Copy Detail
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Service/Activity	Provider/Responsible Person
Emotional SupportSupervision	Martha Matthews
Unique Child Condition Service	Dr. James Michaelson

Options: Go

Done Local intranet

Tab Overview

The Parent/Caregiver Protective Capacities Tab is the second tab. If an Initial Assessment was selected on the Assessment Selection pop-up, the tab pre-fills with safety threats, participants identified as Parents and their corresponding Adult Functioning Narratives (from IA-PC or IA Narrative only). The Safety Assessment Expando is expanded by default and safety threats are pre-filled the way they were answered on the Assessment. If no Assessment was selected, the safety threats will not pre-fill. The Parent/Caregivers box pre-fills with the full names of parents on the Initial Assessment selected to pre-fill. When a parent/caregiver is selected, the Adult Functioning/Parenting Practices narrative and Goals are refreshed and show data for the selected person. The Adult Functioning/Parenting Practices narrative pre-fills with the Narrative entered on the selected Initial Assessment. When the page is first created the Goals box will be empty. Clicking the insert button will open the Case Plan Goal page. When the worker returns from the Case Plan Goal Page the Goal Narrative, Begin Date, Target End Date, Service/Activity and Provider/Responsible Person information will display in view only mode and will sort by "Begin Date".

Tab Information

Expando: Safety Assessment **Default view is expanded when page is opened.**
Box: Safety Threats

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- Fields:** One or both parents / caregivers cannot control behavior:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.
- One or both parent / caregivers are violent:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.
- One or both parent / caregivers have failed to benefit from previous professional help:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.
- There is some indication parents / caregivers may flee:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.
- One or both parents / caregivers intend(ed) to hurt the child and do not show remorse:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.
- Maltreating parent / caregiver exhibits no remorse or guilt:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.
- Child has exceptional needs which parent / caregiver cannot / will not meet:
Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is

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updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

No adult in the home will perform parental duties and responsibilities:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parent / caregivers fear they will maltreat child and / or request placement:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parent / caregivers lack knowledge, skill, motivation in parenting which affects the child's safety:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Child is perceived in extremely negative terms by one or both of the parents / caregivers:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Child is seen by either parent / caregiver as responsible for the parent's / caregiver's problems:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Parents / caregivers do not have resources to meet basic needs:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

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Living arrangements seriously endanger the physical health of the child:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Plan record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Box: Parents/Caregivers

Fields: Parent/Caregiver Name:

Name of Parent/Caregiver in a repeating group with a radio button in the column to left of the name. Parent's name is displayed in following format: (Last Name, First Name MI., Suffix). Repeating group rows pre-fill with the names of participants in the "Parent Information" box of the "Part. Info" tab of the Initial Assessment (Primary Caregivers or Narrative), if an Assessment was selected to create the FA&CP. If no Assessment was selected to create the FA&CP, the repeating group is empty on initial creation of the page. First parent in the repeating group is selected by default. When a radio button is selected the Adult Functioning/Parenting Practices Narrative and Goals for that parent are displayed.

Button: Add/Edit:

Opens the Case Participants pop-up for user to add or remove participants from the box. Always enabled on an editable page.

Box: Parent/Caregiver Protective Capacities

Fields: Describe how adult functioning (general functioning, daily life management, mental health functioning and substance use) impacts parenting practices (disciplinary approaches, nurturing, limit setting, protectiveness, provision of basic care, etc.). When a child is unsafe, determine how diminished parent/caregiver protective capacities impact impending danger threats (foreseeable danger) to safety:

User-entered comments field. Enabled and required. If Assessment was used to create the FA&CP, on creation of the page the field pre-fills text from the Adult Functioning Tab of the Initial Assessment (Primary Caregivers or Narrative) for the parent selected in the Parents/Caregivers box. Saves to the DOC_NARRATIVE Table; 150,000 character limit.

Box: Goals

Repeating Group 1

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Fields:	Goal:	The Goal entered on the Case Plan Goal page. "Goal" label is within the field. System Derived; View Only. Height expands based on length of goal.
	Begin Date:	The Begin Date entered on the Case Plan Goal page. "Begin Date" label is within the field. Not Required. System Derived; View Only. Format MM/DD/YYYY
	Target End Date:	The Target End Date entered on the Case Plan Goal page. "Target End Date" label is within the field. Not Required. System Derived; View Only. Format MM/DD/YYYY

Links:

Edit:	This Edit link appears next to each editable Goal. This link launches the Case Plan Goal Page. When the FA&CP has been approved, the Edit link will be replaced by a View link.
Delete:	This Delete link appears next to each editable Goal. This link deletes the goal and all associated services/activities, providers, service/activity explanations. When Delete is clicked, the user will receive the following message. "This will delete the Goal with any documented Services/Activities and Providers. Continue?" When the FA&CP has been approved, the Delete link will be removed.
Copy Detail:	This Copy Detail link opens the Goal Copy page so the user can copy the Goal to another participant in the Parents/Caregivers box. When the FA&CP has been approved, the Copy Detail link will be removed.

Nested repeating group: **Displays all Services and Providers for the Goal. Sorted Ascending by Service/Activity field. Can have many rows for each Goal.**

Fields:

Service/Activity:	Displays Service entered on the Case Plan Goal Page. System Derived; View Only. First column in nested repeating group table.
Responsible person/provider:	Displays Responsible person/provider entered on the Case Plan Goal Page. System Derived; View Only. Second column in nested repeating group table.

Buttons:

Insert:	Opens an empty Case Plan Goal page. Enabled until the FA&CP is approved.
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Page Buttons:

Save:	Standard save processing.
Close:	Standard close processing.

Background Processing:

- If upon creation of the page, a user selects an assessment to pre-fill when the FA&CP opens, the following data is pre-filled into the FA&CP:
 1. The Safety Threats are answered with the same answers as they contained on the Safety Assessment associated with the Initial Assessment. (note: IA-Narrative may not have safety assessment to pull from. If so, safety threats are blank.)
 2. Parent/Caregiver names pre-fill into the Parent/Caregiver group box for every parent on the Assessment.
 3. **(IA-PC)** A concatenation of the Adult functioning, Disciplinary Approaches, and Parenting Practices narratives from the Initial Assessment-Primary Caregivers page will pre-fill to the Parent/Caregiver Protective Capacities group box for each parent on the Assessment. Each section will be separated by a carriage return.
 4. **(IA-N)** The Adult functioning narrative from the Initial Assessment-Narrative page will pre-fill to the Parent/Caregiver Protective Capacities group box for each parent on the Assessment.

NOTE: These pre-fills only occur upon creation of the FA&CP. Once the page is created, the data does not pre-fill again when the page is re-accessed.

- Clicking Delete in the Goals box, will throw a Delete Confirmation message "This will delete the Goal with any associated Services/Activities and Providers. Continue? (Yes/No)" If 'Yes' = deletes the goal and services from the Goal box (Commit to database, i.e., the deletion of the goal and services, only occurs by clicking 'Save' on the page). If 'No' = returns the user to the page without deleting the Goal.

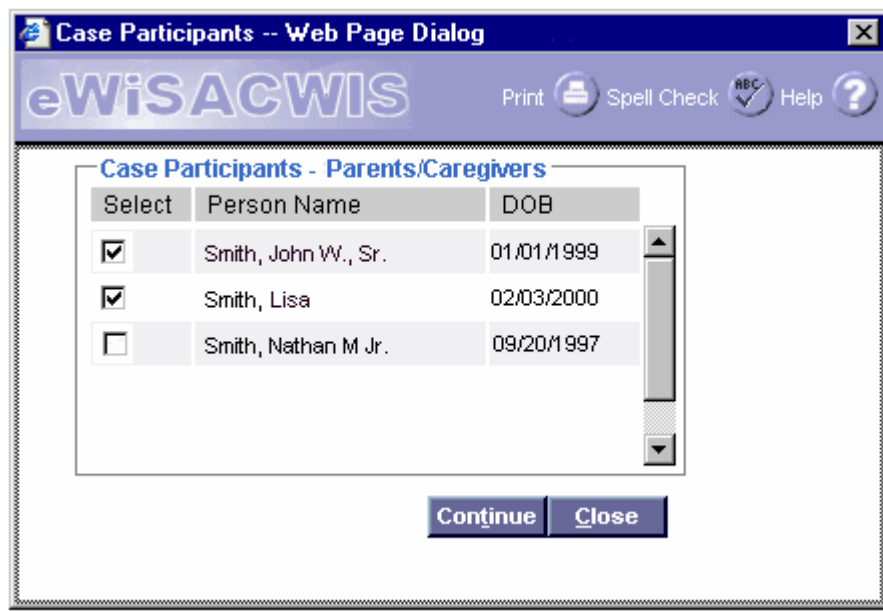
Save Processing:

- If a user changes the answer to one of the safety threats after the associated Safety Assessment & Planning has been completed, the following message will be displayed when clicking the Save button: "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan."
- If a safety threat on the FA&CP is changed after the Safety Assessment & Planning has been completed, and the user goes directly to the Approval after making the change, the system will allow the user to access the Approval page and select 'Approve' without giving them a validation message. When the user attempts to save in this particular scenario, they will receive the following message, "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan." The approval request will not go through.
- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

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- Standard save processing to the appropriate database tables.

Pop-up - Case Participants



Pop-up Overview

The Case Participants pop-up allows workers to add and remove participants from the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab. Name and Date of birth are displayed for each participant.

When the Add/Edit button on the Child Functioning Tab is clicked, the Case Participants pop-up displays all case participants who are currently in the Children group box with the Select checkbox checked. All active, case participants not on the plan and who are not currently on the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab appear without the checkbox selected.

Pop-up Information

Box: Case Participants-Parents/Caregivers

Fields: Select: Checkboxes corresponding to each person in the list. Checked for participants in the Parents/Caregivers box of the FA&CP. Unchecked for participants not in the Parents/Caregivers box. When selected or deselected, Continue button is enabled.

Person Name: Names of Participants in the Parents/Caregivers box and names of other Participants on the case who are not on the

eWiSACWIS Ongoing Change Order

any tab on the FA&CP. Format. Read Only; System Derived. (Last Name, First Name MI., Suffix).

DOB: Date of Birth of case participant. Read Only; System Derived. Format in (DD/MM/YYYY).

Buttons:

Continue: Transfers Participants to the Parent/Caregiver Protective Capacities Tab. Becomes enabled when any participant is selected or deselected.

Close: Returns the user to the Parent/Caregiver Protective Capacities Tab without saving any changes.

Background Processing:

- When a Case Participant is selected and the Continue button is clicked, that participant is added to the Parents/Caregivers group box of the Parent/Caregiver Protective Capacities Tab.
- When a Case Participant is de-selected and the Continue button is clicked, the participant is removed from the Parents/Caregivers group box of the Parent/Caregiver Protective Capacities Tab.
- When a person is removed from the list and Continue button is clicked. "One or more parents/caregivers have been removed from the list. The Parent/Caregiver Protective Capacities Narrative and Goals will be lost for each removed participant. Continue?" (Yes/No). Clicking 'Yes' will remove the deselected participant(s) from the Parents/Caregivers box.

Save Processing:

N/A

Pop-up - Goal Copy

Case Participants	
Name	DOB
<input type="checkbox"/> Smith, John	
<input type="checkbox"/> Smith, Nathan	10/18/2005

Save Close

Pop-up Overview

The Goal Copy pop-up opens when the user clicks the Copy Detail link in the Goals Group box. The pop-up displays the name and date of birth of case participants who are in the Parents/Caregivers group box of the Parent/Caregiver Protective Capacities Tab.

When a participant is selected and the Save button is clicked, an identical goal is copied to the selected person. Goals can be copied to multiple participants at the same time.

Pop-up Information

Box: Case Participants-Parents/Caregivers

Fields: Checkbox: Checkboxes corresponding to each participant in the Parents/Caregivers box of the FA&CP. When checked, Save button is enabled.

Person Name: Names of Participants in the Parents/Caregivers box. Read Only; System Derived. Format: (Last Name, First Name MI., Suffix).

DOB: Date of Birth of case participant. Read Only; System Derived. Format in (DD/MM/YYYY).

Buttons:

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Save:	Copies Goal to selected Participants. Enabled when any participant is selected.
Close:	Returns the user to the Parent/Caregiver Protective Capacities Tab and the copied goals are displayed in the Goals group box. Prompts for save if page has changed without being saved.

Background Processing:

- Selected Checkboxes are disabled after the Save button is clicked.
- Only Participants from the current tab are displayed in the Goal Copy pop-up.
- When the user clicks the Close they are returned to the Child Functioning Tab.

Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'
- When a Case Participant is selected and the Save button is clicked, the Goal (Goal, Services, Providers) for which the Copy Detail link was clicked is copied to participants selected on the pop-up.

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Family Functioning Tab

The screenshot shows the 'Family Assessment & Case Plan' window. At the top, there are tabs for 'Child Functioning', 'Parent/Caregiver Protective Capacities', 'Family Functioning' (which is selected), and 'Roles & Responsibilities'. Below the tabs, there is a header section with case information: Case Name: Corey Canadian, Case Number: 9221592, Effective Date: 12/31/2005, Status: Ongoing, Worker Name: Daisy Dan, Approval Date: 01/04/2005, and FA&CP Completed: ☐. The main content area is divided into two sections. The first section, 'Family Functioning', has a description: 'Describe the family's general functioning, strengths and current stresses. Consider the family's cultural context.' Below this is a large text area with a pre-fill text: 'Pre-fills from IA-PC, IA Narrative, or most recent FA/CP or CPE.' The second section, 'Goals', contains a table of goals. The first goal is: 'Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.' with a Begin Date of 01/05/2006 and Target End Date of 01/05/2006. The second goal is: 'Goal: Maintenance of a safe, stable, nurturing environment for family members.' with a Begin Date of 01/05/2006 and Target End Date of 01/05/2006. The table also includes columns for 'Service/Activity' and 'Provider/Responsible Person'. The first goal's service is 'Emotional SupportSupervision' and the provider is 'Martha Matthews'. The second goal's service is 'Unique Child Condition Service' and the provider is 'Dr. James Michaelson'. At the bottom of the window, there is an 'Options:' dropdown menu, a 'Go' button, and 'Save' and 'Close' buttons. The status bar at the very bottom shows 'Done' and 'Local intranet'.

Service/Activity	Provider/Responsible Person
Emotional SupportSupervision	Martha Matthews
Unique Child Condition Service	Dr. James Michaelson

Tab Overview

The Family Functioning Tab is the third tab of the FA&CP. If an Initial Assessment was selected on the Assessment Selection pop-up, the tab pre-fills with corresponding Family Functioning Narrative (from IA-PC or IA Narrative only). The Family Functioning narrative pre-fills with the Narrative entered on the selected Initial Assessment. When the page is first created the Goals box will be empty. Clicking the insert button will open the Case Plan Goal page. When the worker returns from the Case Plan Goal Page the Goal Narrative, Begin Date, Target End Date, Service/Activity and Provider/Responsible Person information will display read only mode and will sort by "Begin Date".

Tab Information

Box: Family Functioning

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Fields: Describe the family's general functioning, strengths and current stresses. Consider the family's cultural context:

User-entered comments field. Enabled and required. If Assessment was used to create the FA&CP, on creation of the page the field pre-fills text from the Family Functioning Tab of the Initial Assessment (Primary Caregivers or Narrative). Saves to the DOC_NARRATIVE Table; 50,000 character limit.

Box: Goals

Repeating Group 1

Fields: Goal:

Sorted by Begin Date

The Goal entered on the Case Plan Goal page. "Goal" label is within the field. Read Only; System Derived. Height expands based on length of goal.

Begin Date: The Begin Date entered on the Case Plan Goal page. "Begin Date" label is within the field. Not Required. Read Only; System Derived. Format in MM/DD/YYYY

Target End Date: The Target End Date entered on the Case Plan Goal page. "Target End Date" label is within the field. Not Required. Read Only; System Derived. Format in MM/DD/YYYY

Links:

Edit: This Edit link appears next to each editable Goal. This link launches the Case Plan Goal Page. When the FA&CP has been approved, the Edit link will be replaced by a View link.

Delete: This Delete link appears next to each editable Goal. This link deletes the goal and all associated services/activities, providers, service/activity explanations. When Delete is clicked, the user will receive the following message. "This will delete the Goal with any documented Services/Activities and Providers. Continue?" When the FA&CP has been approved, the Delete link will be removed.

Copy Detail: Displays a message "This will create a copy of the Goal on the Family Functioning Tab. Continue?" (Yes/No) Clicking 'Yes' will insert an exact copy of the goal in the Goals box of the Family Functioning Tab. Clicking 'No' returns the user to the tab without saving changes. When the FA&CP has been approved, the Copy Detail link will be removed.

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Nested repeating group: Displays all Services and Providers for the Goal. Sorted Ascending by Service/Activity field. Can have many rows for each Goal.

Fields:

Service/Activity: Displays Service entered on the Case Plan Goal Page. Read Only; System Derived. First column in nested repeating group table.

Responsible Person/Provider:

Displays Responsible person/provider entered on the Case Plan Goal Page. Read Only; System Derived. Second column in nested repeating group table.

Buttons:

Insert: Opens an empty Case Plan Goal page. Enabled until the FA&CP is approved.

Page Buttons:

Save: Standard save processing.

Close: Standard close processing.

Background Processing:

- If upon creation of the page, a user selects an assessment to pre-fill when the FA&CP opens, the following data is pre-filled into the FA&CP:
 1. The Family Functioning narrative from the Initial Assessment-Narrative or Initial Assessment - Primary Caregivers page will pre-fill to the Family Functioning group box.

NOTE: Pre-fill only occurs upon creation of the FA&CP. Once the page is created, the data does not pre-fill again when the page is re-accessed.

- Clicking Delete in the Goals box, will throw a Delete Confirmation message "This will delete the Goal with any associated Services/Activities and Providers. Continue? (Yes/No)" If 'Yes' = deletes the goal and services from the Goal box (Commit to database, i.e., the deletion of the goal and services, only occurs by clicking 'Save' on the page). If 'No' = returns the user to the page without deleting the Goal.

Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

Tasks & Responsibilities Tab

Page Overview

The Tasks & Responsibilities Tab is the fourth tab on the FA&CP page. This tab is comprised of three group boxes. The Safety Decision informs the worker about the Safety Decision which is derived based on how safety threats are answered on the Child Functioning and Parent/Caregiver Protective Capacities Tabs. When the tab is accessed, if the safety decision is 'Yes', a message will be displayed alerting the worker that the children may be unsafe and to proceed with Safety Assessment and Planning.

The Additional Tasks and Responsibilities narrative is available for workers to document any additional work that must be done to help the family meet their goals.

The Family Service Level captured upon supervisory approval of the Initial Assessment carries forward to the FA&CP. Workers must select a current Family Service Level based on the Family Assessment completed as part of the FA&CP. Workers can provide a justification for selecting the Family Service Level in the "Provide Justification for Family Service Level" field.

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Tab Information

Box: Safety Decision

Fields: One or more factors that negatively affect safety are identified:

Safety Decision: Yes, No radio button; system derived from the Safety Assessment Table. Yes or No radio button is selected based on the answers for the Safety Assessment questions. Read only; not user modified; disabled and grayed out.

Safety Decision: System derived text field from the Safety Assessment Table. A value of "Safe" is displayed if 'No' is selected for the above radio button (i.e., "One or more factors are identified ..."). If 'Yes' radio button is selected, the Safety Decision field will display a system derived value of 'Unsafe'. Read only; not user modified; disabled and grayed out.

Box: Additional Tasks and Responsibilities

Fields: Describe any additional tasks or responsibilities (e.g. transportation, other case management responsibilities, etc.) that will assist the family in achieving the identified goals:

User-entered comments field. Enabled prior to approval not required. Saves to the DOC_NARRATIVE Table; 50,000 character limit.

Box: Family Service Level

Fields: Previously established Family Service Level:

System derived from the Initial Assessment Table; disabled.

Current Family Service Level:

User selected drop down; defaults to Blank. Required. Available values: Low, Moderate, High, Intensive. System will generate a reminder upon save if this box is not completed. Text of reminder: "Please enter data in the fields which are highlighted - <tab name> tab – <name of field>" (Standard)

Provide Justification for Family Service Level:

User-entered comments field. Enabled prior to approval. Not required. Saves to the DOC_NARRATIVE Table; 5000 character limit.

Page Buttons:

Save: Standard save processing.

Close: Standard close processing.

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Background Processing:

- The radio buttons and text field in the Safety Decision group box will be system calculated and derived based on how the Safety Assessment threats were answered. If one or more question is answered 'Yes', the Safety Decision = Unsafe. If all questions are answered 'No', the Safety Decision = Safe.
- When the Tasks & Responsibilities Tab is accessed, if Safety Decision = Unsafe, the following message is displayed "The child(ren) may be unsafe. Please proceed to Safety Assessment and Planning to consider the parent/caregiver protective capacities and the need to control for safety."
- The Family Service Level established through the Initial Assessment is displayed on the "Previously established Family Service Level:" field. This pre-fills from the most recent Family Service level calculated for the family.

Save Processing:

- Save Processing is initiated by clicking on the Continue button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

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Case Plan Goal page

Case Plan Goal

Print Spell Check ABC Help ?

Goal

Participant: Smith, Mary

Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.

Goal Begin Date: 00/00/0000 Goal End Date: 00/00/0000

Services Activities

Service / Activity: Emotional Support Supervision Delete

Provider / Resp. Person: Martha Matthews

Specifically Explain Service / Activity: 1st Friday of every month if needed. Otherwise, every other Friday is sufficient.

Service / Activity: Unique Child Condition Service Delete

Provider / Resp. Person: Dr. James Michaelson

Specifically Explain Service / Activity: 1st Friday of every month if needed. Otherwise, every other Friday is sufficient.

Insert

Save Close

Done Local intranet

Page Overview

Navigation

A worker opens the Case Plan Goal page by clicking the Insert button in the Goals group box on the Child Functioning, Parent/Caregiver Protective Capacities and Family Functioning Tabs. Once a goal has been saved, the worker can access the Case Plan Goal page by clicking the Edit Link if the FA&CP has not been approved or the View link if the FA&CP has been "Approved" or "Not Approved".

Page Summary

To add a Goal to the Family Assessment & Case Plan, the worker uses the Case Plan Goal page. Workers write the Goal, record a Begin Date and Target End Dates for that goal in the Goal group box. Multiple Services/Activities can be recorded for each Goal in the Services/Activities group box.

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Page Information

Box: Goal

Fields: Participant: Displays the name of the Participant if the goal is for a child or parent/caregiver. (Last Name, First Name MI., Suffix) Displays "Family" if the goal applies to the whole family; read only; system derived.

Goal: User-entered comments field. Enabled prior to approval and not required. 400 character limit.

Begin Date: User entered Date, Not required; Must be earlier than the Target End Date. Can be backdated or future dated. Format in (MM/DD/YYYY)

Target End Date: User entered Date, Not required; Must follow the Begin Date. Must be a future date. Format in (MM/DD/YYYY)

Box: Services/Activities

Fields: Service/Activity: System derived dropdown list. Required, non editable and defaults to blank. Field length: 40

Available values:

- Alternate Care Services
- AODA Assessment
- AODA Treatment
- Basic Home Management
- Case Management Services
- Counseling
- Economic Support
- Educational Assessment/Services
- Daycare
- Developmental Assessment
- Family Interaction
- Housing Assistance
- Independent Living
- Juvenile Justice Services/Activities
- Medical/Dental Services
- Mental Health Assessment
- Mental Health Treatment
- Parenting Services
- Probation & Parole Services
- Recreational Activities
- Respite
- Social/Emotional Support
- Specialized Medical/Care Services
- Transportation

Provider /Responsible Person :

User-entered text field. Enabled prior to approval and required. 80 character limit.

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.	Specifically Explain Service/Activity:	User entered comments field, not required, enabled prior to approval. Saves to the DOC_NARRATIVE table; 4000 characters.
	Target End Date:	User entered Date, Not required, and must follow the Begin Date; must be a future date; format:(MM/DD/YYYY).
Links:	Delete:	This Delete link appears next to each Service/Activity. This link deletes the Service, Provider and "Specifically Explain..." When Delete is clicked, the user will receive the following message. "This will delete the Service/Activity and Provider/Responsible Person. Continue?" When the FA&CP has been approved, the Delete link will be removed.
Buttons:	Insert:	Inserts a blank record in the Services/Activities group box. Enabled until final approval of FA&CP.
Page Buttons:	Save:	Standard save processing.
	Close:	Standard close processing.

Background Processing:

- When the page opens the participant name pre-fills with the name of the person for whom the goal is being inserted, unless the goal applies to the family. If the goal applies to the family, "Family" is displayed in the Participant

Save Processing:

- Standard 'Save' processing.
- Run validation against dates to verify that the Begin Date precedes the Target End Date and that the Target End Date is a future date.

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New online page: Case Progress Evaluation page

Page Overview

The Case Progress Evaluation page is accessed via Create > Case Work > Ongoing Services > Case Progress Evaluation. The user will not be able to create a Case Progress Evaluation if there is no existing Family Assessment/Case Plan.

The Case Progress Evaluation page is made up of the following five tabs: Child Functioning, Parent/Caregiver Protective Capacities, Family Functioning, Tasks & Responsibilities and Summary. The worker may access templates under the Options dropdown field from any tab. The Approval option appears under the Options dropdown on the Child Functioning Tab.

When the Case Progress Evaluation page is accessed, the safety threats from the Safety Assessment & Planning record from the most recent (approved) Family Assessment & Case Plan or Case Progress Evaluation will be copied over to the Case Progress Evaluation page. When the Case Progress Evaluation is saved, a new Safety Assessment & Planning record is created and with the appropriate safety analysis and plan items pre-filled (see Safety Assessment & Planning change order for details)

Templates

2 new templates must be created for the Case Progress Evaluation page:

1. Case Progress Evaluation, Safety Assessment and Case Closure
2. Case Progress Evaluation Summary template

Both of these templates can be launched from any tab on the page.
See template mapping documents for details on the templates.

Case Progress Evaluation Header Information

The Case Progress Evaluation Header displays basic identifying information about the Case, Worker creating the page, the status of the Case Progress Evaluation, the effective date and approval date. The system will pre-fill each field except for the Effective Date field which is a user entered date field.

Header Information

Box: Case Progress Evaluation

Fields: Case Name: Field displaying the full case name (Last Name, First Name MI.); pre-fills from the Case Header on Maintain Case page; read only.

Worker Name: The full name (Last Name, First Name, MI., Suffix) of the worker who initially created the Case Progress Evaluation; system derived from the Worker Table; read only.

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Case Number:	Case ID; read only; system derived.
Approval Date:	The date the Family Assessment & Case Plan receives supervisory approval; read only; system derived.
Effective Date:	User entered date represents the date the Plan goes into effect; required; editable until final approval.
Status:	Field displaying the status of the Case Progress Evaluation. The 5 possible statuses are: Pending; Ongoing (CPE has to be approved); Historical (status is used when a new CPE is created); Terminated; read only; system derived.
CPE Completed:	This checkbox triggers the system to run validation edits on the page upon Save. This allows the worker to save the page without completing all fields; user entered; defaults to unchecked.

Child Functioning Tab

The screenshot shows the 'Case Progress Evaluation' window with the 'Child Functioning' tab selected. The form includes fields for Case Name, Case Number, Effective Date, Status, Worker Name, Approval Date, and CPE Completed checkbox. The 'Child Functioning' section has a 'Safety Evaluation' dropdown, a 'Children' list with radio buttons for Mary Smith, John Smith, and Nathan Smith, and an 'Add' button. The 'Child Functioning' text area contains the instruction 'Describe the child's general functioning and effects of any maltreatment.' and a note about prefills. The 'Active Goals' section displays a table of goals with columns for Goal, Target End Date, Status, and Action links (Progress, Delete, Copy Detail). The table shows two goals: one for verbal expression and one for a new goal narrative. The bottom of the form has an 'Options' dropdown, a 'Go' button, and 'Save' and 'Close' buttons. The status bar at the bottom shows 'Done' and 'Local intranet'.

Case Progress Evaluation

Print Spell Check Help

Case Progress Evaluation

Case Name: Corey Canadian Case Number: 9221592 Effective Date: 12/31/2005 Status: Pending
Worker Name: Daisy Dan Approval Date: 01/04/2005 CPE Completed: ☐

Child Functioning Parent/Caregiver Protective Capacities Family Functioning Roles Responsibilities Summary

Safety Evaluation

Children

☒ Mary Smith
☐ John Smith
☐ Nathan Smith

Add

Child Functioning

Describe the child's general functioning and effects of any maltreatment.

Prefills from IA-PC, IA Narrative or Most recent FA/Case Plan or CPE

Active Goals

Goal	Target End Date	Status	Action
Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.	01/05/2006	Progress	Progress Delete Copy Detail
Service/Activity: Emotional SupportSupervision Unique Child Condition Service	Provider/Responsible Person: Martha Matthews Dr. James Michaelson		
Goal: New Goal Narrative	01/05/2006	New	Edit Delete Copy Detail

Insert

Options: **Go** **Save** **Close**

Done Local intranet

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Tab Overview

The Child Functioning Tab is the default tab. The Safety Assessment expando is expanded by default and safety threats are pre-filled the way they were answered on the last approved FA&CP or CPE. The Children box pre-fills with the full names of children on the last approved FA&CP or CPE. When a child is selected the Child Functioning Narrative and Goals are refreshed and show data for the selected person. The Child Functioning narrative pre-fills with the Narrative entered on the last approved FA&CP or CPE. When the page is first created the Active Goals box will pre-fill with goals from the Family Assessment & Case Plan or Case Progress Evaluation. Clicking the insert button will open the Case Plan Goal page where a worker can add a new goal. When the worker returns from the Case Plan Goal page the Goal Narrative, Target End Date, Status, Service/Activity and Provider Responsible Person information will display. New goals will always have the status of "New".

The Case Progress Evaluation, Safety Assessment and Case Closure, and Case Progress Evaluation Summary templates and Approval option are available under the Options dropdown on all tabs of the Case Progress Evaluation.

Tab Information

Expando: Safety Assessment **Default view is expanded when page is opened.**

Box: Safety Threats

Fields: Child shows effects of maltreatment, such as serious emotional symptoms and lack of behavioral control:

Yes, No radio buttons; Pre-fills with answer from most recent approved Family Assessment & Case Plan or Case Progress Evaluation; user editable; not required until the worker CPE Completed checkbox is checked; on Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers; saves to SAFETY_ASSESSMENT_PLANNING Table.

Child is fearful of home situation:

Yes, No radio buttons; Pre-fills with answer from most recent approved Family Assessment & Case Plan or Case Progress Evaluation; user editable; not required until the worker CPE Completed checkbox is checked; on Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers; saves to SAFETY_ASSESSMENT_PLANNING Table.

Child shows no effects of maltreatment such as serious physical symptoms:

Yes, No radio buttons; Pre-fills with answer from most recent approved Family Assessment & Case Plan or Case Progress Evaluation; user editable; not required until the worker CPE Completed checkbox is checked; on Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers; saves to SAFETY_ASSESSMENT_PLANNING Table.

Box: Children

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Fields:	Child Name:	Name of Child in a repeating group with a radio button in the column to left of the name; child's name is displayed in following format: (Last Name, First Name MI., Suffix); repeating group rows pre-fill with the names of participants in the "Children" box of the last approved Family Assessment & Case Plan or Case Progress Evaluation; first child in the repeating group is selected by default; when a radio button is selected, the Child Functioning Narrative and Goals for selected child are displayed.
Button:	Add/Edit:	Opens the Case Participants pop-up for user to add or remove participants from the box; always enabled on an editable page.
Box:	Child Functioning	
Fields:	Describe the child's general functioning and effects of any maltreatment:	User-entered comments field; upon creation of the page, the field pre-fills text from the Child Functioning Tab of the Family Assessment & Case Plan or Case Progress Evaluation for the child selected in the Children box enabled; required; saves to the DOC_NARRATIVE Table; 50,000 character limit.
Box:	Active Goals	Displays Goals when status is Null, New, Continue Current Goal, Revised.
Repeating Group 1		
Fields:	Goal:	The Goal entered on the Case Plan Goal page; "Goal" label is within the field; height expands based on length of goal read only; system derived.
	Target End Date:	The Target End Date entered on the Case Plan Goal page. "Target End Date" label is within the field; read only; system derived; format: MM/DD/YYYY.
	Status:	The Status documented on the Case Plan Goal Progress page; "Status" label is within the field; defaults to Null; read only; system derived; display abbreviated statuses: Continue, Revised, New.
Links:	Edit:	This Edit link appears next to each editable Goal; launches the Case Plan Goal Page; when the CPE has been approved, the Edit link will be replaced by a View link; only available for goals with status of 'New'.

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Delete:	This Delete link appears next to each editable Goal; deletes the goal and associated services/activities, providers, service/activity explanations; when clicked, the user will receive the following message. "This will delete the Goal with any documented Services/Activities and Providers. Continue?"; when the CPE has been approved, the Delete link will be removed; not available for Goals with the status of "Achieved".
Progress:	The Progress link opens the Case Plan Goal Progress page to document the progress and select the status of the goal; when the CPE has been approved, the Edit link will be replaced by a View Progress link; not available for goals with status of "New".
Copy Detail:	This Copy Detail link opens the Goal Copy page so the user can copy the Goal to another participant in the Children Box; when the CPE has been approved, the Copy Detail link will be removed; available for all goal statuses.
Nested repeating group:	Displays all Services and Providers for the Goal; sorted ascending by Service/Activity field; can have many rows for each Goal.
Fields:	
Service/Activity:	Displays Service entered on the Case Plan Goal Page; read only; system derived; first column in nested repeating group table.
Responsible Person/Provider:	Displays Responsible Person/Provider entered on the Case Plan Goal Page; read only; system derived; second column in nested repeating group table.
Buttons:	
Insert:	Opens an empty Case Plan Goal page; enabled until the CPE is approved.

Expando: **Achieved/Historical Goals** Default view when page is opened is closed.

Box: Achieved/Historical Goals:
Displays Goals when status is Achieved or No Longer Applicable

Fields:	Goal:	Goal text; "Goal" label is within the field; read only; system derived; height expands based on length of goal.
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Target End Date:	Goal's Target End Date; "Target End Date" label is within the field; read only; system derived; format MM/DD/YYYY
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Status:	The Status documented on the Case Plan Goal Progress page; "Status" label is within the field; defaults to Status recorded on last approved CPE; read only; system derived; display statuses: Achieved, No Longer Applicable.
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Progress: The Progress link opens the Case Plan Goal Progress page to document the progress and select the status of the goal;

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when the CPE has been approved, the Edit link will be replaced by a View Progress link; not available for goals that pre-fill with status of Achieved when plan is created.

View Progress: Link that opens the non-editable Case Plan Goal Progress Page; prior to approval only displays on goals that pre-fill with a status of Achieved; after approval displays for all Goals.

Delete: Link that appears next to each editable Goal; deletes the goal and associated services/activities, providers, service/activity explanations; when Delete is clicked, the user will receive the following message: "This will delete the Goal with any documented Services/Activities and Providers. Continue?"; when the CPE has been approved, the Delete link will be removed; only available for goals with the status of No Longer Applicable; not available for Achieved goals.

Copy Detail: Link opens the Goal Copy page so the user can copy the goal to another participant in the Children box; when the CPE has been approved, the Copy Detail link will be removed.

Nested repeating group: **Displays all Services and Providers for the Goal; sorted ascending by Service/Activity field; can have many rows for each Goal.**

Fields:

Service/Activity: Displays Service entered for Achieved or No Longer Applicable goals; read only; system derived; first column in nested repeating group table.

Responsible Person/Provider: Displays Responsible Person/Provider entered for Achieved or No Longer Applicable goals; read only; system derived; second column in nested repeating group table.

Buttons:

No buttons

Page Buttons:

Save: Standard save processing.

Close: Standard close processing.

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Background Processing:

- When the user creates the CPE from the Create Case Work page, the system looks up the most recent approved FA&CP or CPE. The following data is pre-filled into the CPE:
 1. The Safety Threats are answered with the same answers as they contained on the Family Assessment & Case Plan or CPE.
 2. Child names pre-fill into the Children group box for every child on the FA&CP or CPE.
 3. Child Functioning narratives from the FA&CP or CPE pre-fill to the Child Functioning group box for each child on the FA&CP or CPE.
 4. Goals, Services/Activities, Providers/Responsible Persons, Target End Dates pre-fill into the Active Goals and Achieved/Historical Goals group box for every child on the FA&CP or CPE.
 5. Status pre-fills from the last approved CPE for the goals in the Achieved/Historical group box. Status is initially blank for Goals in the Active Goals Group box.
- **NOTE:** These pre-fills only occur upon creation of the CPE. Once the page is created, the data does not pre-fill again when the page is re-accessed.
- If the user attempts to create a new Case Progress Evaluation for a case with a 'pending' Case Progress Evaluation on record, s/he will receive the following message, and will not be able to proceed: "A pending Case Progress Evaluation exists for this case. Please access and complete the pending Case Progress Evaluation from the Cases outliner."
- If the user attempts to create a Case Progress Evaluation for a case with no "Ongoing" Case Plan or CPE on record, s/he will receive the following message, and will not be able to proceed: "There is no Ongoing Family Assessment & Case Plan or Case Progress Evaluation for this case. A Family Assessment & Case Plan must be completed prior to the Case Progress Evaluation."
- There are four plan status values for the Case Progress Evaluation page: *Pending* (once a CPE is created and prior to supervisory approval); *Ongoing* (once a CPE is approved by a supervisor); *Historical* (once a supervisor approves a new Case Progress Evaluation when an ongoing plan exists); *Terminated* (when a CPE is specifically terminated by the user) *Not Approve* (when the CPE is "Not Approved").
- Goals pre-fill into the Active group box of the Case Progress Evaluation with no Status documented. If a goal has pre-filled, the "Progress", "Copy Detail" and "Delete" links are available.
- When a user clicks the Progress link, the Case Plan Goal Progress page opens. All information except the "Document progress and/or barriers..." narrative field and Status dropdown field are disabled.
- Once the user documents the goal's status on the current CPE, the status is displayed in the Active Goals group box.
- When a goal's status changes to Achieved or No Longer Applicable the goal is moved to the Achieved/Historical Goals group box.
- When a worker changes the goal's status to Achieved, the status can be changed until the CPE is approved. The status of Achieved goals cannot be changed on subsequent CPEs.
- When the CPE is created, the goals that had status of Achieved and No Longer Applicable on the last approved CPE, pre-fill into the Achieved/Historical Goals Group box. The status for these goals is displayed. When the Case Plan Goal Progress page is opened for goal that pre-

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filled with status of Achieved, all fields are disabled and the goal is frozen. When the Case Plan Goal Progress page is opened for a No Longer Applicable Goal, all fields are disabled except for the Status field. The user can change the status to Achieved, Continue Current Goal or Revised Goal/Service/Activity/Service Provider.

APPROVAL LOGIC

- When the user accesses Approval in the Options dropdown and clicks the Go Button, the system will perform the following logic:
 1. Verify if page has been saved and a Safety Assessment & Planning page was created;
 - If FALSE, display message "The Case Progress Evaluation cannot be approved until the associated Safety Assessment & Plan is complete." "Not Approve" is currently the only Approval option available. Continue?"
 - If the Safety Assessment & Planning exists, retrieve value from SAFETY_ASMNT_PLANNING.fl_complete.
 - i. IF = Y; allow user through to the Approval History page for the FA&CP (Approve & Not Approve available as options)
 - ii. IF = N, display message, "The Case Progress Evaluation cannot be approved until the associated Safety Assessment & Plan is complete. "Not Approve" is currently the only Approval option available. Continue?" (YES /NO) Approve Option is disabled, Not Approve is enabled.
- When the user selects Approve on the CPE's Approval History page, the CPE Completed checkbox will be automatically checked to enforce the page validation
- Not Approving the CPE will "Not Approve" the associated Safety Assessment & Planning record.
- Approving the CPE will also approve the associated Safety Assessment & Planning record.
- After the CPE is approved, Terminate appears in the Options dropdown.

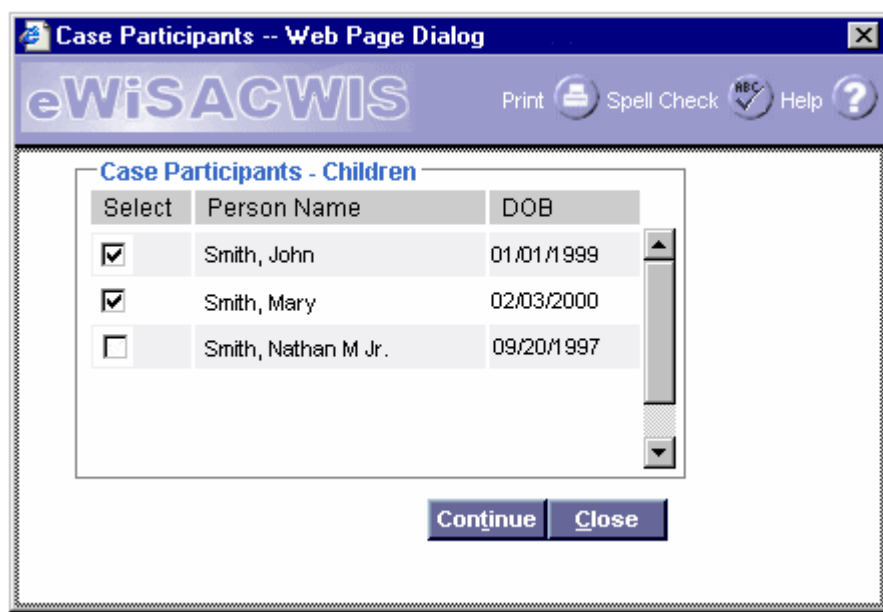
Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'
- Required field validations will not be processed until the user clicks the CPE Completed checkbox. When the user selects the CPE Completed checkbox and clicks the Save button, the page edits will run against all required fields for all tabs and all participants. If the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab contains more than one participant the system will validate required narrative fields for each participant.
- The messages displayed when required narrative information is missing are the following:
 - "Please enter data in the fields which are highlighted – Child Functioning tab – Child Functioning text"
 - "Please enter data in the fields which are highlighted - Parent/Caregiver Protective Capacities tab – Parent/Caregiver Protective Capacities text"
 - "Please enter data in the fields which are highlighted - Family Functioning tab – Family Functioning text"

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- There is no requirement for a minimum number of children or parents to be added to the CPE. User can remove all participants who do not have any Achieved Goals documented.
- The system should not allow a participant with any goals with the status of Achieved to be deleted.
- There is no requirement for a minimum number of goals when the page is validated. The worker can insert a participant without adding a goal.
 - Safety Threats will be validated only after the user has selected the CPE Completed checkbox. Users will receive the following message when any of the Safety Threats have not been answered: "Please enter data in the fields which are highlighted - <tab name> tab – One or more of the Safety Threat questions have not been answered”.
- If a user changes the answer to one of the safety threats after the associated Safety Assessment & Planning has been completed, the following message will be displayed: "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan."
- If a safety threat on the CPE is changed after the Safety Assessment & Planning has been completed, and the user goes directly to the Approval after making the change, the system will allow the user select the Approve option on the Approval History page. When the user attempts to save the page, the following message will display, "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan." The approval request will not go through.

Pop-up Case Participants



Pop-up Overview

The Case Participants pop-up allows workers to add and remove participants from the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab. Name and date of birth are displayed for each participant.

When the Add/Edit button on the Child Functioning Tab is clicked, the Case Participants pop-up displays all case participants who are currently in the Children group box with the Select checkbox checked. Because Achieved goals cannot be deleted from the Plan, the checkbox should be disabled for participants who have goals with the status of Achieved. All other active case participants, not currently part of the Case Progress Evaluation will appear with the checkbox unchecked.

Pop-up Information

Box: Case Participants-Children

Fields: Select: Checkboxes corresponding to each person in the list; checked for participants in the Children box of the CPE; unchecked for participants not in the Children box; when selected or deselected, Continue button is enabled.

Person Name: Names of Participants in the Children box and names of other Participants on the case who are not on the Parenting

eWiSACWIS Ongoing Change Order

Practices Tab; read only; system derived; format:(Last Name, First Name MI., Suffix).

DOB: Date of Birth of Case participant; read only; system derived, view only; format: (DD/MM/YYYY).

Buttons:

Continue: Transfers Participants to the Child Functioning Tab; becomes enabled when any participant is selected or deselected.

Close: Returns the user to the Child Functioning Tab without saving any changes.

Background Processing:

- When a Case Participant is selected and the Continue button is clicked, that participant is added to the Children group box of the Child Functioning Tab.
- If the worker's age is greater than 18, the worker receives a warning message stating: "One or more case participants that are over 18 years of age have been selected as children. Do you wish to keep the selection?" (Yes/No). Clicking 'Yes' will add the newly selected participant(s) to the Children box.
- When a Case Participant is de-selected and the Continue button is clicked, the participant is removed from the Children group box of the Child Functioning Tab.
- The checkbox should be disabled for Participants who have goals with the status of Achieved.
- When a person is removed from the list and Continue button is clicked. "One or more children have been removed from the list. The Child Functioning Narrative and Goals will be deleted for each removed participant. Continue?" (Yes/No). Clicking 'Yes' will remove the deselected participant(s) from the Children box.

Pop-up - Goal Copy

Case Participants		
	Name	DOB
<input type="checkbox"/>	Smith, John	
<input checked="" type="checkbox"/>	Smith, Nathan	10/18/2005

Save Close

Pop-up Overview

The Goal Copy pop-up opens when the user clicks the Copy Detail link in the Active Goals and Achieved/Historical group boxes. The pop-up displays the name and date of birth of case participants who are in the Children group box of the Child Functioning Tab.

When a participant is selected and the Save button is clicked, an identical goal is copied to Active Goal group box for the selected person. Goals can be copied to multiple participants at the same time.

Pop-up Information

Box: Case Participants-Children

Fields: Checkbox: Checkboxes corresponding to each participant in the Children box of the CPE; when checked, Save button is enabled.

Person Name: Names of Participants in the Children box; read only; system derived; format: (Last Name, First Name MI., Suffix).

DOB: Date of Birth of Case participant; read only; system derived; format: (DD/MM/YYYY)

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Buttons:

Save:	Copies Goal to selected Participants. Becomes enabled when any participant is selected.
Close:	Returns the user to the Child Functioning Tab and the copied goals are displayed in the Active Goals group box; prompts for save if page has changed without being saved.

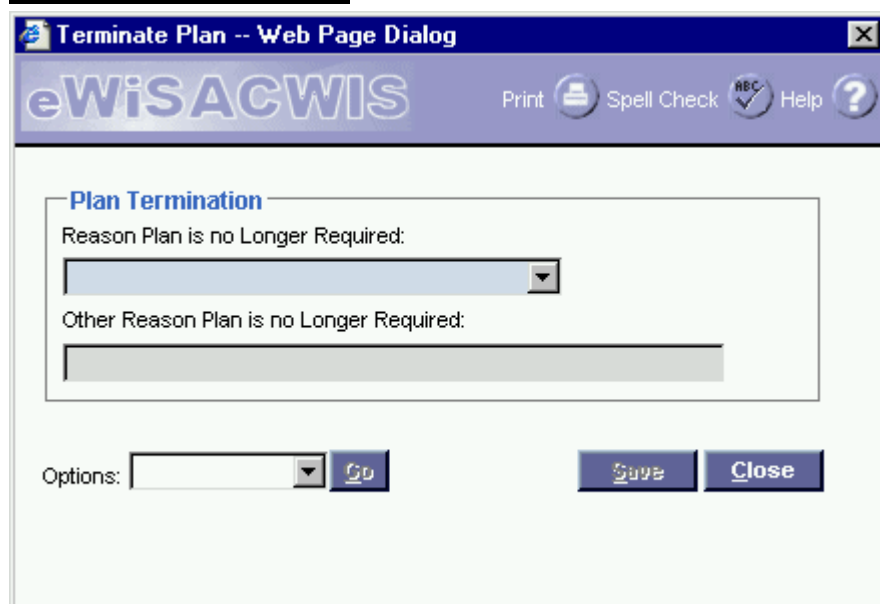
Background Processing:

- Selected Checkboxes are disabled after the Save button is clicked.
- Only Participants from the current tab are displayed in the Goal Copy pop-up.
- When the user clicks the Close button, they are returned to the Child Functioning Tab.

Save Processing:

- When a Case Participant is selected and the Save button is clicked, the Goal (Goal, Services, Providers) on the Child Functioning Tab for which the Copy Detail link was clicked is copied to participants selected on the pop-up.
- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

Pop-up - Terminate Plan



Pop-up Overview

The Terminate Plan pop-up page is used to terminate an ‘Ongoing’ Case Progress Evaluation, thereby ending the family’s involvement in the current FA&CP and CPE process. Creating a new FA&CP starts the planning process over and no prior FA&CP or CPE details pre-fill into the FA&CP.

The Terminate Plan page is accessed by selecting the Terminate option in the Options dropdown field on the Child Functioning Tab of the CPE page, and then by clicking the Go button. The Terminate selection in the Options dropdown field will only be visible for ‘Ongoing’ CPEs.

Upon activating this pop-up page, the user must select a reason that the Plan is no longer required. If the user selects a value of ‘Other’ from the “Reason Plan is no Longer Required” dropdown field, the “Other Reason Plan is no Longer Required” text field is enabled and required. If the user selects a value apart from ‘Other’ from the “Reason Plan is no Longer Required” dropdown field, the “Other Reason Plan is no Longer Required” text field is disabled and not required.

To receive approval for the CPE termination, the user selects the Approval option in the Options dropdown field, and then clicks the Go button, which launches the Approval History page. A CPE cannot be terminated unless supervisory approval for termination has been granted.

The termination of the plan cannot be “Not Approved” by either worker or supervisor. The “Not Approve” radio-button on the Approval History page for case termination is disabled. If the termination process was initiated by mistake it should be approved and a new plan will be created

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Pop-up Information

Box:	Plan Termination	
Fields:	Reason Plan is no Longer Required:	User-selected dropdown field. User-editable; required. If the “Other” value is selected, the Other Reason Plan is no Longer Required text field is enabled.
	Other Reason Plan is No longer Required:	User-entered text field. Enabled and required if the “Other” value is selected from the Reason Plan is no Longer Required dropdown field; user-editable when enabled.
Buttons:	Save:	Standard Save processing.
	Close	Standard Close processing; returns the worker to the Case Progress Evaluation page.

Background Processing

- The user will select a reason for terminating the plan.
- If the user selects a value of ‘Other’ from the “Reason Plan is no Longer Required” dropdown field, the “Other Reason Plan is no Longer Required” text field is enabled and required.
- If the user selects a value other than ‘Other’ from the “Reason Plan is no Longer Required” dropdown field, the “Other Reason Plan is no Longer Required” text field is disabled and not required.
- If the worker attempts to save the page without answering required fields, an error message will display stating “Please enter data in fields which are highlighted. - <tab name> tab - <field name>”
- Upon supervisory approval of the plan termination, the Case Progress Evaluation tickler will be deleted.
- Upon supervisory approval of the plan termination, the CPE status changes to Terminated.

Save Processing

- Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering ‘Yes’ when the system asks the user if s/he would like to ‘Save changes before closing the page.’

Parent/Caregiver Protective Capacities Tab

Case Progress Evaluation

Case Name: Corey Canadian Case Number: 9221592 Effective Date: 12/31/2005 Status: Pending
 Worker Name: Daisy Dan Approval Date: 01/04/2005 CPE Completed: ☐

Parent/Caregiver Protective Capacities

Safety Evaluation

Parents/Caregivers

- ☒ Lisa Smith
- ☐ John W. Smith Sr.

Parent/Caregiver Protective Capacities

Describe how adult functioning (general functioning, daily life management, mental health functioning and substance use) impacts parenting practices (disciplinary approaches, nurturing, limit setting, protectiveness, provision of basic care, etc.). When a child is unsafe, determine how diminished parent/caregiver protective capacities impact impending danger threats (foreseeable danger) to safety.

Prefills from IA-PC, IA Narrative or Most recent FA/Case Plan or CPE

Active Goals

Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.	Target End Date: 01/05/2006	Status: Continue	Progress Delete Copy Detail
Service/Activity: Emotional Support Supervision Unique Child Condition Service	Provider/Responsible Person: Martha Matthews Dr. James Michaelson		

Options:

Done Local intranet

Tab Overview

The Parent/Caregiver Protective Capacities Tab is the second tab of the CPE. The Safety Assessment expando is expanded by default and safety threats are pre-filled the way they were answered on the last approved FA&CP or CPE. The Parents/Caregivers box pre-fills with the full names of parents/caregivers on the last approved FA&CP or CPE. When a parent is selected the Parent/Caregiver Protective Capacities Narrative and Goals are refreshed and show data for the selected person. The Parent/Caregiver Protective Capacities narrative pre-fills with the Narrative entered on the last approved FA&CP or CPE. When the page is first created the Active Goals box will pre-fill with goals from the Family Assessment & Case Plan or Case Progress Evaluation. Clicking the insert button will open the Case Plan Goal page where a worker can add a new goal. When the worker returns from the Case Plan Goal page the Goal Narrative, Target End Date, Status, Service/Activity and Provider Responsible Person information will display. New goals will always have the status of "New".

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Parent/Caregiver Protective Capacities Tab Information

Expando: Safety Assessment **Default view is expanded when page is opened.**

Box: Safety Threats

Fields: One or both parents / caregivers cannot control behavior:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parent / caregivers are violent:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parent / caregivers have failed to benefit from previous professional help:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

There is some indication parents / caregivers may flee:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parents / caregivers intend(ed) to hurt the child and do not show remorse:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Maltreating parent / caregiver exhibits no remorse or guilt:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

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Child has exceptional needs which parent / caregiver cannot / will not meet:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

No adult in the home will perform parental duties and responsibilities:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parent / caregivers fear they will maltreat child and / or request placement:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

One or both parent / caregivers lack knowledge, skill, motivation in parenting which affects the child's safety:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Child is perceived in extremely negative terms by one or both of the parents / caregivers:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Child is seen by either parent / caregiver as responsible for the parent's / caregiver's problems:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Parents / caregivers do not have resources to meet basic needs:

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Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Living arrangements seriously endanger the physical health of the child:

Yes, No radio buttons. Radio buttons are user editable, and not required until the worker approval is entered. Upon Save, the associated Safety Assessment & Planning record is updated with the Safety Threat answers. Saves to SAFETY_ASSESSMENT_PLANNING Table.

Box: Parents/Caregivers

Fields: Parent/Caregiver Name:

Name of Parent/Caregiver in a repeating group with a radio button in the column to left of the name; Parent's name is displayed in following format: (Last Name, First Name MI., Suffix). Repeating group rows pre-fill with the names of participants in the "Parents" box of the FA&CP or CPE used to pre-fill the page; first parent in the repeating group is selected by default;. when a radio button is selected, the Parent/Caregiver Protective Capacities Narrative and Goals for that parent are displayed.

Button: Add/Edit:

Opens the Case Participants pop-up for user to add or remove participants from the box; enabled on an editable page.

Box: Parent/Caregiver Protective Capacities

Fields: Describe how adult functioning (general functioning, daily life management, mental health functioning and substance use) impacts parenting practices (disciplinary approaches, nurturing, limit setting, protectiveness, provision of basic care, etc.). When a child is unsafe, determine how diminished parent/caregiver protective capacities impact impending danger threats (foreseeable danger) to safety:

User-entered comments field; enabled; required; pre-fills from most recent approved FA&CP or CPE created on the case for the parent selected in the Parents/Caregivers box. Saves to the DOC_NARRATIVE Table; 150,000 character limit.

Box: Active Goals

Displays Goals when status is Null, New, Continue Current Goal, Revised.

Repeating Group 1

eWiSACWIS Ongoing Change Order

Fields:	Goal:	The Goal entered on the Case Plan Goal page; "Goal" label is within the field; height expands based on length of goal read only; system derived.
	Target End Date:	The Target End Date entered on the Case Plan Goal page. "Target End Date" label is within the field; read only; system derived; format: MM/DD/YYYY.
	Status:	The Status documented on the Case Plan Goal Progress page; "Status" label is within the field; defaults to Null; read only; system derived; display abbreviated statuses: Continue, Revised, New.
Links:	Edit:	This Edit link appears next to each editable Goal; launches the Case Plan Goal Page; when the CPE has been approved, the Edit link will be replaced by a View link; only available for goals with status of 'New'.
	Delete:	This Delete link appears next to each editable Goal; deletes the goal and associated services/activities, providers, service/activity explanations; when clicked, the user will receive the following message. "This will delete the Goal with any documented Services/Activities and Providers. Continue?"; when the CPE has been approved, the Delete link will be removed; not available for Goals with the status of "Achieved".
	Progress:	The Progress link opens the Case Plan Goal Progress page to document the progress and select the status of the goal; when the CPE has been approved, the Edit link will be replaced by a View Progress link; not available for goals with status of "New".
	Copy Detail:	This Copy Detail link opens the Goal Copy page so the user can copy the Goal to another participant in the Parents/Caregivers Box; when the CPE has been approved, the Copy Detail link will be removed; available for all goal statuses.
Nested repeating group:		Displays all Services and Providers for the Goal; sorted ascending by Service/Activity field; can have many rows for each Goal.

Fields:

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Service/Activity: Displays Service entered on the Case Plan Goal Page; read only; system derived; first column in nested repeating group table.

Responsible Person/Provider: Displays Responsible Person/Provider entered on the Case Plan Goal Page; read only; system derived; second column in nested repeating group table.

Buttons:

Insert: Opens an empty Case Plan Goal page; enabled until the CPE is approved.

Expando: **Achieved/Historical Goals** Default view when page is opened is closed.

Box: **Achieved/Historical Goals:** Displays Goals when status is Achieved or No Longer Applicable

Repeating Group 2

Fields: **Goal:** Goal text; "Goal" label is within the field; read only; system derived; height expands based on length of goal.

Target End Date: Goal's Target End Date; "Target End Date" label is within the field; read only; system derived; format MM/DD/YYYY

Status: The Status documented on the Case Plan Goal Progress page; "Status" label is within the field; defaults to Status recorded on last approved CPE; read only; system derived; display statuses: Achieved, No Longer Applicable.

eWiSACWIS Ongoing Change Order

Links:

Progress:	The Progress link opens the Case Plan Goal Progress page to document the progress and select the status of the goal; when the CPE has been approved, the Edit link will be replaced by a View Progress link; not available for goals that pre-fill with status of Achieved when plan is created.
View Progress:	Link that opens the read only Case Plan Goal Progress Page; prior to approval only displays on goals that pre-fill with a status of Achieved; after approval displays for all Goals.
Delete:	Link that appears next to each editable Goal; deletes the goal and associated services/activities, providers, service/activity explanations; when Delete is clicked, the user will receive the following message: "This will delete the Goal with any documented Services/Activities and Providers. Continue?"; when the CPE has been approved, the Delete link will be removed; only available for goals with the status of No Longer Applicable; not available for Achieved goals.
Copy Detail:	Link opens the Goal Copy page so the user can copy the goal to another participant in the Parents/Caregivers box; when the CPE has been approved, the Copy Detail link will be removed.

Nested repeating group: **Displays all Services and Providers for the Goal; sorted ascending by Service/Activity field; can have many rows for each Goal.**

Fields:

Service/Activity:	Displays Service entered for Achieved or No Longer Applicable goals; read only; system derived; first column in nested repeating group table.
Responsible Person/Provider:	Displays Responsible Person/Provider entered for Achieved or No Longer Applicable goals; read only; system derived; second column in nested repeating group table.

Buttons:

No buttons

eWiSACWIS Ongoing Change Order

Page Buttons:

Save:	Standard save processing.
Close:	Standard close processing.

Background Processing:

- When the user creates the CPE from the Create Case Work page, the system looks up the most recent approved FA&CP or CPE. The following data is pre-filled into the CPE:
 1. The Safety Threats are answered with the same answers as they contained on the Family Assessment & Case Plan or CPE.
 2. Parent/caregiver names pre-fill into the Parents/Caregivers group box for every parent/caregiver on the FA&CP or CPE.
 3. Parents/Caregivers Protective Capacities narratives from the FA&CP or CPE pre-fill to the Parents/Caregivers Protective Capacities group box for each child on the FA&CP or CPE.
 4. Goals, Services/Activities, Providers/Responsible Persons, Target End Dates pre-fill into the Active Goals and Achieved/Historical Goals group box for every parent/caregiver on the FA&CP or CPE.
 5. Status pre-fills from the last approved CPE for the goals in the Achieved/Historical group box. Status is initially blank for Goals in the Active Goals Group box.

NOTE: These pre-fills only occur upon creation of the CPE. Once the page is created, the data does not pre-fill again when the page is re-accessed.
- Goals pre-fill into the Active group box of the Case Progress Evaluation with no Status documented. If a goal has pre-filled, the "Progress", "Copy Detail" and "Delete" links are available.
- When a user clicks the Progress link, the Case Plan Goal Progress page opens. All information except the "Document progress and/or barriers..." narrative field and Status dropdown field are disabled.
- Once the user documents the goal's status on the current CPE, the status is displayed in the Active Goals group box.
- When a goal's status changes to Achieved or No Longer Applicable the goal is moved to the Achieved/Historical Goals group box.
- When a worker changes the goal's status to Achieved, the status can be changed until the CPE is approved. The status of Achieved goals cannot be changed on subsequent CPEs.
- When the CPE is created, the goals that had status of Achieved and No Longer Applicable on the last approved CPE, pre-fill into the Achieved/Historical Goals Group box. The status for these goals is displayed. When the Case Plan Goal Progress page is opened for goal that pre-filled with status of Achieved, all fields are disabled and the goal is frozen. When the Case Plan Goal Progress page is opened for a No Longer Applicable Goal, all fields are disabled except for the Status field. The user can change the status to Achieved, Continue Current Goal or Revised Goal/Service/Activity/Service Provider.

eWiSACWIS Ongoing Change Order

Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'
- If a user changes the answer to one of the safety threats after the associated Safety Assessment & Planning has been completed, the following message will be displayed: "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan."
- If a safety threat on the CPE is changed after the Safety Assessment & Planning has been completed, and the user goes directly to the Approval after making the change, the system will allow the user select the Approve option on the Approval History page. When the user attempts to save the page, the following message will display, "The changes you have made to Safety Threats have been reflected on the associated Safety Assessment & Planning record. Please access the Safety Assessment & Planning record to update your Safety Plan." The approval request will not go through.

Pop-up Case Participants

Select	Person Name	DOB
<input checked="" type="checkbox"/>	Smith, John W., Sr.	01/01/1999
<input checked="" type="checkbox"/>	Smith, Lisa	02/03/2000
<input type="checkbox"/>	Smith, Nathan M Jr.	09/20/1997

Pop-up Overview

The Case Participants pop-up allows workers to add and remove participants from the Child Functioning Tab or Parent/Caregiver Protective Capacities Tab. Name and date of birth are displayed for each participant.

When the Add/Edit button on the Parent/Caregiver Protective Capacities Tab is clicked, the Case Participants pop-up displays all case participants who are currently in the Parent/Caregiver group box with the Select checkbox checked. Because Achieved goals cannot be deleted from the Plan, the checkbox should be disabled for participants who have goals with the status of Achieved. All other active case participants, not currently part of the Case Progress Evaluation will appear with the checkbox unchecked.

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Box: Case Participants-Parents/Caregivers

Fields: Select: Checkboxes corresponding to each person in the list; checked for participants in the Parents/Caregivers box of the CPE; unchecked for participants not in the Parents/Caregivers box; when selected or deselected, Continue button is enabled.

Person Name: Names of Participants in the Parents/Caregivers box and names of other Participants on the case who are not on the Child functioning Tab; read only; system derived; format:(Last Name, First Name MI., Suffix).

DOB: Date of Birth of Case participant; read only; system derived, view only; format: (DD/MM/YYYY).

Buttons:

Continue: Transfers Participants to the Parents/Caregivers Tab; becomes enabled when any participant is selected or deselected.

Close: Returns the user to the Child Functioning Tab without saving any changes.

Background Processing:

- When a Case Participant is selected and the Continue button is clicked, that participant is added to the Parents/Caregivers group box of the Parent/Caregiver Protective Capacities Tab.
- The checkbox should be disabled for Participants who have goals with the status of Achieved.
- When a Case Participant is de-selected and the Continue button is clicked, the participant is removed from the Parents/Caregivers group box of the Parent/Caregiver Protective Capacities Tab.
- When a person is removed from the list and Continue button is clicked. "One or more parents/caregivers have been removed from the list. The Parent/Caregiver Protective Capacities Narrative and Goals will be lost for each removed participant. Continue?" (Yes/No). Clicking 'Yes' will remove the deselected participant(s) from the Parents/Caregivers box.

Save Processing:

N/A

Pop-up - Goal Copy

Case Participants		
	Name	DOB
<input type="checkbox"/>	Smith, John	
<input type="checkbox"/>	Smith, Nathan	10/18/2005

Save Close

Pop-up Overview

The Goal Copy pop-up opens when the user clicks the Copy Detail link in the Goals Group box. The pop-up displays the name and date of birth of case participants who are in the Parents/Caregivers group box of the Parent/Caregiver Protective Capacities Tab.

When a participant is selected and the Save button is clicked, an identical goal is copied to the selected person. Goals can be copied to multiple participants at the same time.

Pop-up Information

Box: Case Participants-Parents/Caregivers

Fields: Checkbox: Checkboxes corresponding to each participant in the Parents/Caregivers box of the CPE; when checked, Save button is enabled.

Person Name: Names of Participants in the Parents/Caregivers box; read only; system derived; format: (Last Name, First Name MI., Suffix).

DOB: Date of Birth of Case participant; read only; system derived; format: (DD/MM/YYYY)

Buttons:

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Save:	Copies Goal to selected Participants; enabled when any participant is selected.
Close:	Returns the user to the Parent/Caregiver Protective Capacities Tab and the copied goals are displayed in the Goals group box; prompts for save if page has changed without being saved.

Background Processing:

- Selected Checkboxes are disabled after the Save button is clicked.
- Only Participants from the current tab are displayed in the Goal Copy pop-up.
- When the user clicks the Close button, they are returned to the Parent/Caregiver Protective Capacities Tab.

Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'
- When a Case Participant is selected and the Save button is clicked, the Goal (Goal, Services, Providers) for which the Copy Detail link was clicked is copied to participants selected on the pop-up.

Family Functioning Tab

The screenshot shows the 'Case Progress Evaluation' window with the 'Family Functioning' tab selected. The window has a title bar with standard OS controls and a menu bar with 'Print', 'Spell Check', 'ABC', and 'Help'. Below the menu bar, the 'Case Progress Evaluation' section contains fields for Case Name (Corey Canadian), Case Number (9221592), Effective Date (12/31/2005), Status (Pending), Worker Name (Daisy Dan), Approval Date (01/04/2005), and CPE Completed (checkbox). The 'Family Functioning' tab is active, showing a 'Safety Evaluation' section with a 'Describe the family's general functioning, strengths and current stresses. Consider the family's cultural context.' instruction. Below this is a large text area with a pre-filled note: 'Prefills from IA-PC, IA Narrative or Most recent FA/Case Plan or CPE'. The 'Active Goals' section contains two goal entries. The first goal is 'Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner...' with a target end date of 01/05/2006 and a status of 'Continue'. The second goal is 'Maintenance of a safe, stable, nurturing environment for family members.' with a target end date of 03/05/2006 and a status of 'Revised'. Each goal entry has a table with 'Service/Activity' and 'Provider/Responsible Person' columns. The first goal's table lists 'Emotional SupportSupervision' and 'Unique Child Condition Service' under 'Service/Activity', and 'Martha Matthews' and 'Dr. James Michaelson' under 'Provider/Responsible Person'. The second goal's table is empty. Each goal entry also has 'Progress', 'Delete', and 'Copy Detail' links. At the bottom of the 'Active Goals' section is an 'Insert' button. The window also has an 'Options:' dropdown and a 'Go' button at the bottom left, and 'Save' and 'Close' buttons at the bottom right. The status bar at the very bottom shows 'Done' and 'Local intranet'.

Tab Overview

The Family Functioning Tab is the third tab of the CPE. The Family Functioning narrative pre-fills with the Narrative entered on the most recent approved Family Assessment & Case Plan or Case Progress Evaluation. When the page is first created, the Active Goals box will pre-fill from the most recent approved Family Assessment & Case Plan or CPE. Clicking the insert button will open the Case Plan Goal page. Clicking the Progress link allows the user to document progress and status of goals.

Tab Information

Box: Family Functioning

Fields: Describe the family's general functioning, strengths and current stresses. Consider the family's cultural context:

User-entered comments field; enabled; required; pre-fills from most recent approved FA&CP or CPE created on the case for the parent selected in the Parents/Caregivers box.

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		Saves to the DOC_NARRATIVE Table; 50,000 character limit.
Box:	Active Goals	Displays Goals when status is Null, New, Continue Current Goal, Revised.
Repeating Group 1		
Fields:	Goal:	The Goal entered on the Case Plan Goal page; "Goal" label is within the field; height expands based on length of goal read only; system derived.
	Target End Date:	The Target End Date entered on the Case Plan Goal page. "Target End Date" label is within the field; read only; system derived; format: MM/DD/YYYY.
	Status:	The Status documented on the Case Plan Goal Progress page; "Status" label is within the field; defaults to Null; read only; system derived; display abbreviated statuses: Continue, Revised, New.
Links:		
	Edit:	This Edit link appears next to each editable Goal; launches the Case Plan Goal Page; when the CPE has been approved, the Edit link will be replaced by a View link; only available for goals with status of 'New'.
	Delete:	This Delete link appears next to each editable Goal; deletes the goal and associated services/activities, providers, service/activity explanations; when clicked, the user will receive the following message. "This will delete the Goal with any documented Services/Activities and Providers. Continue?"; when the CPE has been approved, the Delete link will be removed; not available for Goals with the status of "Achieved".
	Progress:	The Progress link opens the Case Plan Goal Progress page to document the progress and select the status of the goal; when the CPE has been approved, the Edit link will be replaced by a View Progress link; not available for goals with status of "New".
	Copy Detail:	This Copy Detail link opens the Goal Copy page so the user can copy the Goal to another participant in the Parents/Caregivers Box; when the CPE has been approved, the Copy Detail link will be removed; available for all goal statuses.

eWiSACWIS Ongoing Change Order

Nested repeating group: Displays all Services and Providers for the Goal; sorted ascending by Service/Activity field; can have many rows for each Goal.

Fields:

Service/Activity: Displays Service entered on the Case Plan Goal Page; read only; system derived; first column in nested repeating group table.

Responsible Person/Provider: Displays Responsible Person/Provider entered on the Case Plan Goal Page; read only; system derived; second column in nested repeating group table.

Buttons:

Insert: Opens an empty Case Plan Goal page; enabled until the CPE is approved.

Expando: **Achieved/Historical Goals** Default view when page is opened is not expanded.

Goal	Target End Date	Status	Progress	Delete	Copy Detail
Goal: Verbally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive, and direct. Demonstrates empathy and consideration of others. Makes known thoughts, feelings, needs.	01/05/2006	Continue	Progress	Delete	Copy Detail
Service/Activity	Provider/Responsible Person				
Emotional SupportSupervision	Martha Matthews				
Unique Child Condition Service	Dr. James Michaelson				

[Insert](#)

Achieved/Historical Goals

Achieved/Historical Goals

Goal	Target End Date	Status	View Prgrss	Copy Detail
Goal: Improvement in role as student as evidenced by grades and attendance.	11/02/2005	Achieved	View Prgrss	Copy Detail
Service/Activity	Provider/Responsible Person			
Emotional SupportSupervision	Martha Matthews			

Options: [Go](#) [Save](#) [Close](#)

Done Local intranet

Box: **Achieved/Historical Goals:** Displays Goals when status is Achieved or No Longer Applicable

Repeating Group 2

Fields: Goal: Goal text; "Goal" label is within the field; read only; system derived; height expands based on length of goal.

Target End Date: Goal's Target End Date; "Target End Date" label is within the field; read only; system derived; format MM/DD/YYYY

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Status: The Status documented on the Case Plan Goal Progress page; "Status" label is within the field; defaults to Status recorded on last approved CPE; read only; system derived; display statuses: Achieved, No Longer Applicable.

Links:

Progress: The Progress link opens the Case Plan Goal Progress page to document the progress and select the status of the goal; when the CPE has been approved, the Edit link will be replaced by a View Progress link; not available for goals that pre-fill with status of Achieved when plan is created.

View Progress: Link that opens the read only Case Plan Goal Progress Page; prior to approval only displays on goals that pre-fill with a status of Achieved; after approval displays for all Goals.

Delete: Link that appears next to each editable Goal; deletes the goal and associated services/activities, providers, service/activity explanations; when Delete is clicked, the user will receive the following message: "This will delete the Goal with any documented Services/Activities and Providers. Continue?"; when the CPE has been approved, the Delete link will be removed; only available for goals with the status of No Longer Applicable; not available for Achieved goals.

Copy Detail: Displays a message "This will create a copy of this Goal on the Family Functioning Tab. Continue?" (Yes/No) Clicking 'Yes' will insert an exact copy of the goal in the Goals box of the Family Functioning Tab. Clicking 'No' returns the user to the tab without saving changes. When the FA&CP has been approved, the Copy Detail link will be removed.

Nested repeating group: **Displays all Services and Providers for the Goal; sorted ascending by Service/Activity field; can have many rows for each Goal.**

Fields:

Service/Activity: Displays Service entered for Achieved or No Longer Applicable goals; read only; system derived; first column in nested repeating group table.

Responsible Person/Provider:

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Displays Responsible Person/Provider entered for Achieved or No Longer Applicable goals; read only; system derived; second column in nested repeating group table.

Buttons:

No buttons

Page Buttons:

Save:	Standard save processing.
Close:	Standard close processing.

Background Processing:

- When the user creates the CPE from the Create Case Work page, the system looks up the most recent approved FA&CP or CPE. The following data is pre-filled into the CPE:
 1. Family Functioning narrative from the most recent approved FA&CP or CPE pre-fills to the Family Functioning group box.
 2. Goals, Services/Activities, Providers/Responsible Persons, Target End Dates pre-fill into the Active Goals and Achieved/Historical Goals group box for every parent/caregiver on the FA&CP or CPE.
 3. Status pre-fills from the last approved CPE for the goals in the Achieved/Historical group box. Status is initially blank for Goals in the Active Goals Group box.**NOTE:** These pre-fills only occur upon creation of the CPE. Once the page is created, the data does not pre-fill again when the page is re-accessed.
- Goals pre-fill into the Active group box of the Case Progress Evaluation with no Status documented. If a goal has pre-filled, the "Progress", "Copy Detail" and "Delete" links are available.
- When a user clicks the Progress link, the Case Plan Goal Progress page opens. All information except the "Document progress and/or barriers..." narrative field and Status dropdown field are disabled.
- Once the user documents the goal's status on the current CPE, the status is displayed in the Active Goals group box.
- When a goal's status changes to Achieved or No Longer Applicable the goal is moved to the Achieved/Historical Goals group box.
- When a worker changes the goal's status to Achieved, the status can be changed until the CPE is approved. The status of Achieved goals cannot be changed on subsequent CPEs.
- When the CPE is created, the goals that had status of Achieved and No Longer Applicable on the last approved CPE, pre-fill into the Achieved/Historical Goals Group box. The status for these goals is displayed. When the Case Plan Goal Progress page is opened for goal that pre-filled with status of Achieved, all fields are disabled and the goal is frozen. When the Case Plan Goal Progress page is opened for a No Longer Applicable Goal, all fields are disabled except for the Status field. The user can change the status to Achieved, Continue Current Goal or Revised Goal/Service/Activity/Service Provider.

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Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

Tasks & Responsibilities Tab

The screenshot shows the 'Case Progress Evaluation' window. At the top, there are tabs for 'Child Functioning', 'Parent/Caregiver Protective Capacities', 'Family Functioning', 'Roles & Responsibilities' (which is selected), and 'Summary'. Below the tabs, there is a 'Safety Decision' section with a text area for 'One or more factors that negatively affect safety are identified:' and radio buttons for 'Yes' and 'No'. The 'Safety Decision' is currently set to 'Unsafe'. Below this is a 'Changes in Additional Tasks & Responsibilities' section with a checkbox 'Use this checkbox when there are changes in the participant tasks and responsibilities'. Below the checkbox is a text area for 'Describe any additional tasks or responsibilities (e.g. transportation, other case management responsibilities, etc.) that will assist the family in achieving the identified goals:'. The text area contains pre-filled text: 'Pre-fills from the last Case Plan or CPE/ Disabled initially / enabled when above checkbox is clicked.' At the bottom of the form, there is an 'Options:' dropdown menu and a 'Go' button. The bottom of the window shows a 'Done' button and a 'Local intranet' status bar.

Tab Overview

The Tasks & Responsibilities Tab is the fourth tab on the CPE page. This tab is comprised of three group boxes. The Safety Decision informs the worker about the Safety Decision which is derived based on how safety threats are answered on the Child Functioning and Parent/Caregiver Protective Capacities Tabs. When the tab is accessed, if the safety decision is 'Yes', a message will be displayed alerting the worker that the children may be unsafe and to proceed with the Safety Assessment & Planning.

The Changes in Additional Tasks & Responsibilities narrative is available for workers to document any changes in work that must be done to help the family meet their goals.

Tab Information

Box: Safety Decision

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Fields: One or more factors that negatively affect safety are identified:

Safety Decision: Yes, No radio buttons; system derived from the Safety Assessment Table. Yes or No radio button is selected based on the answers for the Safety Assessment questions; read only;
Text field from the Safety Assessment Table. Safe is displayed if 'No' is selected for the above radio button (i.e., "One or more factors are identified ..."); if Yes radio button is selected, the Safety Decision field will display Unsafe; read only; system derived.

Box: Changes in Additional Tasks & Responsibilities

Fields: Use this checkbox when there are changes in the participant tasks & responsibilities:

User editable checkbox; enabled; defaults to unchecked; not required; When checked the "Describe any changes in tasks..." narrative field is enabled.

Describe any changes in tasks or responsibilities (e.g. transportation, other case management responsibilities, etc.) that will assist the family in achieving the identified goals:

User-entered comments field; defaults to disabled view; not required; enabled when above checkbox is checked. Saves to the DOC_NARRATIVE Table; 50,000 character limit.

Page Buttons:

Save: Standard save processing.

Close: Standard close processing.

Background Processing:

- The radio buttons and text field in the Safety Decision group box will be system calculated and derived based on how the Safety Assessment threats were answered. If one or more question is answered 'Yes', the Safety Decision = Unsafe. If all questions are answered 'No', the Safety Decision = Safe.
- When the Tasks & Responsibilities Tab is accessed, if Safety Decision = Unsafe, the following message is displayed "The child(ren) may be unsafe. Please proceed to the Safety Assessment and Planning to consider the parent/caregiver protective capacities and the need to control for safety."
- Checking the "Use this checkbox when there are changes in the participant tasks & responsibilities" checkbox enables the Describe... narrative.

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Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'

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Pop-up - Case Plan Goal Progress

Case Plan Goal Progress

Print Spell Check Help

Goal

Participant: Smith, Mary

Goal: Emotionally expresses and responds with feelings and thoughts in an appropriate and acceptable manner. Communication is open, honest, constructive and direct. Demonstrates empathy and consideration of others. Makes known thoughts feelings and needs.

Goal Begin Date: 00/00/0000 Target End Date: 00/00/0000

Services Activities

Service / Activity: Emotional Support Supervision

Provider / Resp. Person: Martha Matthews

Specifically Explain Service / Activity: 1st Friday of every month if needed. Otherwise every other Friday is sufficient.

Insert

Status of Goal

Previous Progress and/or Barriers in Achieving Goal:

The family has participated in close to 60% of the activities suggested. Communication is still not open and productive to resolving problems. The child is still emotionally detached from their parents.

Discuss Progress and/or Barriers in Achieving Goal:

The family has been participated in 90% of the activities suggested. Communication between the family has been much better in the past month. While communication has improved, there is still some emotional outburst from the children on occasion.

Save Close

Done Local intranet

eWiSACWIS Ongoing Change Order

Case Plan Goal Progress

Print Spell Check Help

Service / Activity: Emotional Support Supervision [Delete](#)

Provider / Resp. Person: Martha Matthews

Specifically Explain Service / Activity: 1st Friday of every month if needed. Otherwise, every other Friday is sufficient. [Insert](#)

Status of Goal

Previous Progress and/or Barriers in Achieving Goal:

The family has participated in close to 60% of the activities suggested. Communication is still not open and productive to resolving problems. The child is still emotionally detached from their parents.

Discuss Progress and/or Barriers in Achieving Goal:

The family has been participated in 90% of the activities suggested. Communication between the family has been much better in the past month. While communication has improved, there is still some emotional outburst from the children on occasion.

Status of Goal: Revised goal/service/activity/provider Date Achieved: 00/00/0000

Evaluation History

Evaluation Date	Status
01/15/2006	Continue Current Goal
11/05/2005	Revised

[Save](#) [Close](#)

Done Local intranet

Pop-up Overview

Navigation

A worker opens the Case Plan Goal Progress pop-up page by clicking the Progress Link in the Active Goals or Achieved/Historical group box on the Child Functioning, Parent/Caregiver Protective Capacities and Family Functioning Tabs. Once a Case Progress Evaluation has been approved, the worker can access the view only Case Plan Goal Progress pop-up page by clicking the View Progress Link adjacent to a Goal.

Page Summary

Goals pre-fill to the CPE from the most recent approved FA&CP or CPE at the time the new CPE is created. To update progress and status of a Goal, the worker uses the Case Plan Goal Progress pop-up page. The progress narrative and status field must be filled out on each goal on the CPE prior to approval.

All fields except for "Status of Goal" and the "Discuss Progress and/or barriers in Achieving Goal:" are disabled on the page initially. If a worker selects the status "Revised goal/service/activity/provider", the Goal, Goal dates, Services and Provider become enabled.

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Pop-up Information

Box: Goal

Fields: Participant: Displays the name of the Participant if the goal is for a child or parent/caregiver. (Last Name, First Name MI., Suffix; displays "Family" if the goal applies to the whole family; read only; system derived/.

Goal: User-entered comments field; defaults to disabled;; 400 character limit.

Begin Date: User entered date; defaults to disabled; must be earlier than the Target End Date; can be backdated or future dated. Format: (MM/DD/YYYY)

Target End Date: User entered Date, defaults to disabled; must follow the Begin Date; must be a future date; format: (MM/DD/YYYY)

Box: Services/Activities

Repeating Group: **Repeating group of Services/Activities field , Provider/Responsible Person field, and Specifically Explain field with Insert button to insert new group.**

Fields: Service/Activity: System derived dropdown list; defaults to disabled required; non editable until user selects Achieved as goal status; field length: 40.

Available values:

Alternate Care Services
AODA Assessment
AODA Treatment
Basic Home Management
Case Management Services
Counseling
Economic Support
Educational Assessment/Services
Daycare
Developmental Assessment
Family Interaction
Housing Assistance
Independent Living
Juvenile Justice Services/Activities
Medical/Dental Services
Mental Health Assessment
Mental Health Treatment
Parenting Services
Probation & Parole Services
Recreational Activities
Respite
Social/Emotional Support
Specialized Medical/Care Services

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Transportation

Provider /Responsible Person :

User-entered text field. Defaults to disabled. 80 character limit.

Specifically Explain Service/Activity:

User entered comments field, not required, enabled prior to approval. 4000 characters.

Links: Delete: This Delete link appears next to each Service/Activity; deletes the Service, Provider and "Specifically Explain..."; the user will receive the following message. "This will delete the Service/Activity and Provider/Responsible Person. Continue?"; when the CPE has been approved, the Delete link will be removed; only available when the status of goal field is Revised.

Buttons: Insert: Inserts a blank record in the Services/Activities group box. Enabled until final approval of FA&CP. Only Available when status of Goal field is "Revised...."

Box: Status of Goal

Fields: Previous Progress and/or barriers in Achieving Goal:
Text Area field pre-filled with the "Discuss Progress and/or barriers in Achieving Goal:" from the Last CPE; if last work completed was an FA&CP, then the field pre-fills with " Not applicable, this is the first time this goal is being evaluated.'"; read only; system derived..

Discuss Progress and/or barriers in Achieving Goal:

User entered comments field; required; enabled prior to approval; 4000 characters.

Status of Goal: User selected dropdown; required..
Acceptable values

- Achieved
- Continue Current Goal
- No Longer Applicable
- Revised Goal/Service/Activity/Service Provider

Date Achieved: User entered Date field; defaults to disabled; becomes editable and required when the user selects Achieved in the Status of Goal field.

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Expando: Evaluation History: Defaults to not expanded.

Box: Evaluation History: Contains a scrollable repeating group with 2 columns: Evaluation Date and Status. This displays the history of Goal Status and the Date of the CPE that the Goal status was approved. Sorted by date descending order (most recent to earliest)

Page Buttons:

Save:	Standard save processing.
Close:	Standard close processing.

Background Processing:

- This page is accessed from the Case Progress Evaluation page by clicking the Progress link in the Active Goals or Achieved/Historical Goals group boxes. The page will default to all fields being disabled except Status of Goal and Discuss Progress and/or barriers in Achieving Goal. The Status of Goal field will default to blank.
- The Participant Name, Goal, Goal Dates, Services, Provider and Service Explanation fields will pre-fill from the FA&CP or the previous CPE.
- When accessing the page for a goal that was given the status of Achieved on a previous CPE, the page will be completely disabled.
- Upon initial access of the page (i.e., the first CPE or first time goal is being evaluated), the Previous Progress and/or Barriers in Achieving Goal narrative will display the statement, 'Not applicable, this is the first time this goal is being evaluated'. The Evaluation History group box will be blank (no rows with data) the first time the goal is evaluated.
- When 'Revised' is selected from the Status of Goal drop-down, a pop-up window will display the message, "Selecting Revised will save the page and allow you to edit your Goals, Services/Activities and Providers/Responsible Persons. Continue?" Yes and No buttons will be available:
 - If 'Yes' = the page is auto saved and refreshed and the fields in the Goals group box and Services/Activities group box will be enabled; the Delete link will display for each Service/Activity; the Insert button will become enabled.
 - If 'No' = the fields will remain disabled and the status for Status of Goal will display what was previously chosen (before 'Revised' was selected).
- When 'Continue' is selected from the Status of Goal drop-down and the page is saved, the goal is moved to the Active Goals group box on the appropriate tab of the CPE page.
- When 'No Longer Applicable' is selected from the Status of Goal drop-down and the page is saved, the goal is moved to the Achieved/Historical group box on the appropriate tab of the CPE page.
- When 'Achieved' is selected from the Status of Goal drop-down and the value is saved, the goal is moved to the Achieved/Historical group box on the appropriate tab of the CPE page.
- The Evaluation History group box will display the approval dates and statuses of the goal each time it was part of a Case Progress Evaluation.
- Date Achieved field becomes enabled and required when the user sets the Status of Goal field to Achieved.

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Save Processing:

- Save Processing is initiated by clicking on the Save button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if he/she would like to 'Save changes before closing the page.'
- Run edit to verify that upon clicking Save button there is at least one service/activity entered for the goal. If there are no services/activities entered and the user clicks the Save button, a pop-up message should display stating, "There must be at least one service/activity entered for this goal".
- Run edit to verify that upon clicking Save button that all required fields are populated in order to complete save process.

Summary Tab

The screenshot shows the 'Case Progress Evaluation' window with the 'Summary' tab selected. The window title is 'Case Progress Evaluation'. The top navigation bar includes 'Print', 'Spell Check', 'ABC', and 'Help'. The main content area is divided into three sections: 'Case Progress Evaluation Summary', 'Case Closure', and 'Family Service Level'. The 'Case Progress Evaluation Summary' section has a text area for describing the overall case progress. The 'Case Closure' section has a checkbox for 'Case Closure is Appropriate' and three radio button options: 'Threats to child safety have been eliminated or are being successfully managed by family and/or support network.', 'The family refuses services and no jurisdiction exists for ordering services through the court.', and 'Other, explain:'. The 'Family Service Level' section shows 'Previously established Family Service Level: Low' and 'Current Family Service Level: [dropdown menu]'. Below this is a text area for 'Provide Justification for Family Service Level:'. The bottom of the window has an 'Options:' dropdown, a 'Go' button, and 'Save' and 'Close' buttons. The status bar at the bottom shows 'Done' and 'Local intranet'.

Case Progress Evaluation

Case Name: Corey Canadian Case Number: 9221592 Effective Date: 12/31/2005 Status: Pending
Worker Name: Daisy Dan Approval Date: 01/04/2005 CPE Completed: ☐

Case Progress Evaluation Summary

Describe the overall case progress and any other relevant case information:

Case Closure

☐ **Case Closure is Appropriate**

☐ Threats to child safety have been eliminated or are being successfully managed by family and/or support network.
☐ The family refuses services and no jurisdiction exists for ordering services through the court.
☐ Other, explain:

Family Service Level

Previously established Family Service Level: **Low** Current Family Service Level: [dropdown menu]
Provide Justification for Family Service Level:

Options: [dropdown menu] **Go** **Save** **Close**

Done Local intranet

Tab Overview

The Summary Tab is the fifth tab on the CPE page. The Summary Tab is comprised of three group boxes. The Case Progress Evaluation Summary narrative is used to describe overall case progress and any other pertinent case progress information. The Case Closure group box is used to acknowledge case closure and the reasons for that decision. The Family Service Level is carried forward from the most recently documented Family Service Level on the case. Workers

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must select a current Family Service Level based on the Family Assessment completed as part of the FA&CP. Workers can provide a justification for selecting the Family Service Level in the Provide Justification for Family Service Level field.

Tab Information

Box: Case Progress Evaluation Summary

Field: Describe the overall case progress and any other relevant case progress information:

User-entered comments field; enabled prior to approval; not required; saves to the DOC_NARRATIVE table; 50,000 character limit.

Box: Case Closure

Fields: Checkbox: User editable checkbox; defaults to unchecked and editable. When checked, enables the following 3 radio buttons:

Threats to child safety have been eliminated or are being successfully managed by family and/or support network:

Radio button. Radio button is not enabled until the “Case Closure is Appropriate” checkbox is checked.

The family refuses services and no jurisdiction exists for ordering services through the court:

Radio button. Radio button is not enabled until the “Case Closure is Appropriate” checkbox is checked.

Other, explain: Radio button. Radio button is not enabled until the “Case Closure is Appropriate” checkbox is checked. Explain text field becomes required once radio button is selected.

Explain text field: Text field. Defaults to disabled; enabled when the ‘Other, explain:’ radio button is selected; character limit: 150.

Box: Family Service Level

Fields: Previously established Family Service Level:

System derived from the last recorded Family Service Level on Family Assessment & Case Plan, Case Progress Evaluation or Initial Assessment; disabled.

Current Family Service Level:

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User selected drop down; defaults to Blank. Required.
Available values: Low, Moderate, High, Intensive.
System will generate a reminder upon save if this box is not completed.” Please enter data in fields that are highlighted–
Summary tab - Current Family Service Level”

Provide Justification for Family Service Level:

User-entered comments field. Enabled prior to approval.
Not required. Saves to the DOC_NARRATIVE Table;
10000 character limit.

Page Buttons:

Save:	Standard save processing.
Close:	Standard close processing.

Background Processing:

- The Family Service Level established through the most recent FA&CP or CPE is displayed on the "Previously established Family Service Level:" field.
- Explain text field becomes enabled and required when the Other, explain radio button is clicked.

Save Processing:

- Standard save processing.

Changes to Existing Page - Initial Assessment Narrative

Overall Page Change to Save Processing

New required fields are being added to this page and so we must add required field validation to the save processing.

Changes to Existing tab - Participants

When a child is removed from or added to the Child Information group box, the following message should be displayed: "A child is removed/added from the list. You are required to go to the Child Functioning Tab before saving" (Close).

When a parent is removed from or added to the Parent Information group box, the following message should be displayed: "A parent is removed/added from the list. You are required to go to the Adult Functioning Tab before saving" (Close).

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IA-Narrative - New Tab - Child Functioning

Initial Assessment-Narrative -- Web Page Dialog

eWiSACWIS Print Spell Check Help

Case Information

Case Name: Smith, Linda Case ID: 9221387 Referral Date: 07/29/2005

Participants Child Functioning Adult Functioning Family Functioning Maltreatment Summary

Child Functioning

Child Name: Smith, Mary

Describe the child's general functioning and effects of any maltreatment.

Row 1 of 2

Pre-fills to the FA/Case Plan for each child on Assessment.

Child Name: John Smith

Describe the child's general functioning and effects of any maltreatment.

Row 2 of 2

Save Close

Tab Summary

The Child Functioning Tab is a new tab and the second tab on the IA-Narrative. The tab will be located between the Participants and Adult Functioning Tabs.

Tab Information

Box: Child Functioning

Fields: Child Name: The name of the case participant; system derived from the Intake Participant Table. Read only; not user modifiable; disabled. (Last Name, First Name MI., Suffix)

Describe the child's general functioning and effects of any maltreatment:
User-entered comments field; enabled; required. One field per Child identified on the Participants Tab. Saves to the DOC_NARRATIVE Table; 50000 character limit.

Tab Buttons:

Save: Standard Save Processing
Close: Standard Close Processing

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Background Processing

- The Child Functioning group box will contain Narrative fields for all case participant's that are selected as Child on the Participants Tab.
- When a child is removed from the Participants Tab, the Narrative for that child will be removed from the Child Functioning Tab.

Save Processing

- Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if s/he would like to 'Save changes before closing the page.'

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IA-Narrative - New Tab - Adult Functioning

The screenshot shows a web application window titled "Initial Assessment-Narrative -- Web Page Dialog". The header bar contains the "eWiSACWIS" logo and navigation links for "Print", "Spell Check", "REC", and "Help". Below the header is a "Case Information" section with fields for "Case Name: Smith, Linda", "Case ID: 9221387", and "Referral Date: 07/29/2005". A tabbed interface is present with tabs for "Participants", "Child Functioning", "Adult Functioning" (which is selected), "Family Functioning", "Maltreatment", and "Summary". The "Adult Functioning" tab displays a list of two rows. Each row has a "Parental Role Name" field and a large text area for description. Row 1 is for "Smith, Linda" and Row 2 is for "Smith, John M.". The text area for each row contains instructions: "Describe each adult's general functioning, daily life management, mental health functioning and substance use. (You may include but not rate pertinent childhood history information.) Describe the disciplinary approaches generally used by the parent and the typical context within which they are used. Describe the parents' general parenting practices (nurturing, limit setting, protectiveness, provision of basic care, etc.)". At the bottom right of the dialog are "Save" and "Close" buttons.

Tab Summary

Adult Functioning Tab is a new tab on the IA- Narrative. It is the third tab on the page and will be located in between Child Functioning and Adult Functioning Tabs.

Tab Information

Box: Family Functioning

Fields: Parental Role Name:

The name of the case participant; system derived from the Intake Participant Table. Read only; not user modifiable; disabled. (Last Name, First Name MI., Suffix)

Describe each adult's general functioning, daily life management, mental health functioning and substance use. (You may include but not rate pertinent childhood history information.) Describe the disciplinary approaches generally used by the

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parent and the typical context within which they are used. Describe the parents' general parenting practices (nurturing, limit setting, protectiveness, provision of basic care, etc.):

User-entered comments field; enabled; required. One field per parent identified on the Participants Tab. Saves to the DOC_NARRATIVE Table; 50000 character limit.

Tab Buttons:

Save:	Standard Save Processing
Close:	Standard Close Processing

Background Processing

- The Adult Functioning group box will contain Narrative fields for all case participants that are selected as 'Parent' on the Participants Tab.
- When a parent is removed from the Participants Tab, the Narrative for that parent will be removed from the Adult Functioning Tab.

Save Processing

- Save Processing is initiated by clicking on the Save command button. Save processing is also initiated when selecting the Close button, and then answering 'Yes' when the system asks the user if s/he would like to 'Save changes before closing the page.'

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IA-Narrative New Tab - Family Functioning

The screenshot shows a web application window titled "Initial Assessment Narrative -- Web Page Dialog". The application is "eWiSACWIS". At the top, there are buttons for "Print", "Spell Check", "REC", and "Help". Below this is a "Case Information" section with fields for "Case Name: Smith, Linda", "Case ID: 9221387", and "Referral Date: 07/29/2005". A tabbed interface is shown with tabs for "Participants", "Child Functioning", "Adult Functioning", "Family Functioning" (which is selected), "Maltreatment", and "Summary". The "Family Functioning" tab contains a text area with the instruction: "Describe the family's general functioning, strengths, and current stresses. Consider the family's cultural context." Below this instruction is a large text input field with a pre-filled message: "Pre-fills to family functioning tab of Case Plan." At the bottom right of the dialog are "Save" and "Close" buttons.

Tab Summary

Family Functioning Tab is a new tab on the IA- Narrative. It is the fourth tab on the IA-Narrative and will be located in between the Adult Functioning and Maltreatment Tabs.

Tab Information

Box: Family Functioning

Fields: Describe the family's general functioning, strengths and current stresses. Consider the family's cultural context:

User-entered comments field. Field is enabled prior to **approval; required. Saves to the DOC_NARRATIVE** Table; 50000 character limit.

Tab Buttons:

Save:	Standard Save Processing
Close:	Standard Close Processing

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Initial Assessment Narrative - Changes to Existing tab - Narratives Tab

The screenshot shows a web browser window titled "Initial Assessment-Narrative -- Web Page Dialog". The page has a purple header with the "eWiSACWIS" logo and navigation links for "Print", "Spell Check", "Help", and a question mark icon. Below the header is a "Case Information" section with fields for "Case Name: Smith, Linda", "Case ID: 9221387", and "Referral Date: 07/29/2005". A tabbed interface is present with tabs for "Participants", "Child Functioning", "Adult Functioning", "Family Functioning", "Maltreatment", and "Summary". The "Maltreatment" tab is selected and contains the heading "Describe the Maltreatment and Surrounding Circumstances". Below this heading is a text area with instructions: "Describe the maltreatment that occurred. Be specific about injuries and/or conditions. If the child(ren) received medical attention, describe the findings. Also, describe the surrounding circumstances accompanying or leading up to the maltreatment. **Note:** This narrative section should always include the parent's, facility's or other responsible adult's explanation of circumstances even if the finding is no maltreatment." A large, empty text box is provided for the narrative. At the bottom right of the dialog are "Save" and "Close" buttons.

Changes to Narratives Tab

1. Rename 'Narratives' to 'Maltreatment'
2. Remove the Family and Family Member Functioning group box.
3. Enlarge the Describe the Maltreatment and Surrounding Circumstances Narrative field to fill up the tab.

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Initial Assessment Narrative - Changes to Existing tab - Summary Tab

Initial Assessment-Narrative -- Web Page Dialog

eWiSACWIS Print Spell Check Help

Case Information

Case Name: Homemaker, Suzy Case ID: 9221012 Referral Date: 08/02/2002

Participants Child Functioning Adult Functioning Family Functioning Maltreatment **Summary**

Case Disposition

☐ Case Closed Reason Case Closed: [dropdown]

☐ Case Opened Reason Case Opened: [dropdown]

Correspondence

Mandated Reporter

☐ Not applicable

Date mandated reporter given feedback: [00/00/0000]

Relative Reporter

☐ Not applicable

☐ Documented request for information received from relative reporter: [00/00/0000]

☐ Date Letter Sent: [00/00/0000] OR Date of Court Order Barring Disclosure: [00/00/0000]

Substantiation Notification

☐ Not applicable

Date Notice of Child Maltreatment Determination and Right to Appeal Letter Sent: [00/00/0000]

Options: [dropdown] [Go]

Save Close

Changes to Summary Tab

1. Change Case Closed and Case Opened fields in Case Disposition group box to required radio buttons. (Case Closed or Case Opened must be selected in order to save the page)
2. When Case Closed is selected the Reason Case Closed field becomes enabled and required. Reason Case Opened is disabled and set to blank.
3. When Case Opened is selected the Reason Case Opened field becomes enabled and required. Reason Case Closed is disabled and set to blank.
4. On Save if a disposition is not selected, display following validation message "Please enter data in the fields which are highlighted - Summary Tab - Case Disposition"
5. On Save, if a Case Disposition radio button is selected, but the reason field has not been selected, display the appropriate validation message: "Please enter data in the fields which are highlighted - Summary Tab - Reason Case Closed" OR "Please enter data in the fields which are highlighted - Summary Tab - Reason Case Opened"

eWiSACWIS Ongoing Change Order

Changes to Existing Page - Initial Assessment Primary Caregivers

Changes to Existing tab - Summary Tab

Initial Assessment-Primary Caregivers -- Web Page Dialog

eWiSACWIS

Print Spell Check Help

Case Information

Case Name: Whitaker, Bart Case ID: 20236 Referral Date: 07/28/2000 ☒ IAPC Completed

Part. Info Maltreatment ChildFunctng AdultFunctng ParPractices Risk and Safety **Summary**

Family Support Network

If opening/transferring the case for services complete this section by describing the family's support network, taking into account the family's cultural context. Otherwise, go directly to the Closing Summary.

Closing Summary

Closing Summary/Supervisor Comments (Include any referrals to community resources that were made):

Case Disposition

☐ Case Closed Reason Case Closed:

☐ Case Opened Reason Case Opened:

Save Close

Changes to Summary Tab

1. Change Case Closed and Case Opened fields in Case Disposition group box to required radio buttons. (Case Closed or Case Opened must be selected when IAPC Completed checkbox is checked and Save button is clicked)
2. When Case Closed is selected the Reason Case Closed field becomes enabled and required. Reason Case Opened is disabled and set to blank.
3. When Case Opened is selected the Reason Case Opened field becomes enabled and required. Reason Case Closed is disabled and set to blank.
4. When IAPC Completed checkbox is checked and Save button is clicked, if a disposition is not selected, display following validation message "Please enter data in the fields which are highlighted - Summary Tab - Case Disposition"
5. When IAPC Completed checkbox is checked and Save button is clicked, if a Case Disposition radio button is selected, but the reason field has not been selected, display the

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appropriate validation message: "Please enter data in the fields which are highlighted - Summary Tab - Reason Case Closed" OR
"Please enter data in the fields which are highlighted - Summary Tab - Reason Case Opened"

Changes to Existing Page - Initial Assessment Secondary Caregivers

Changes to Existing tab - Summary Tab

Initial Assessment-Secondary Caregivers -- Web Page Dialog

eWiSACWIS

Print Spell Check Help

Case Information

Case Name: Honda, Becky-Third Case ID: 9221768 Referral Date: 02/16/2006

Participants Narratives **Summary**

Case Disposition

☒ Case Closed Reason Case Closed: [dropdown]
☐ Case Opened Reason Case Opened: [dropdown]

Correspondence

Mandated Reporter

☐ Not applicable
Date mandated reporter given feedback: [00/00/0000]

Relative Reporter

☐ Not applicable
☐ Documented request for information received from relative reporter: [00/00/0000]
☐ Date Letter Sent: [00/00/0000] OR Date of Court Order Barring Disclosure: [00/00/0000]

Substantiation Notification

☐ Not applicable
Date Notice of Child Maltreatment Determination and Right to Appeal Letter Sent: [00/00/0000]

Options: [dropdown] [Go]

Save Close

Changes to Summary Tab

1. Change Case Closed and Case Opened fields in Case Disposition group box to required radio buttons. (Case Closed or Case Opened must be selected when Save button is clicked)
2. When Case Closed is selected the Reason Case Closed field becomes enabled and required. Reason Case Opened is disabled and set to blank.
3. When Case Opened is selected the Reason Case Opened field becomes enabled and required. Reason Case Closed is disabled and set to blank.

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4. When Save button is clicked, if a disposition is not selected, display following validation message "Please enter data in the fields which are highlighted - Summary Tab - Case Disposition"
5. When Save button is clicked, if a Case Disposition radio button is selected, but the reason field has not been selected, display the appropriate validation message: "Please enter data in the fields which are highlighted - Summary Tab - Reason Case Closed" OR "Please enter data in the fields which are highlighted - Summary Tab - Reason Case Opened"

eWiSACWIS Ongoing Change Order

Changes to Existing Page - Assessment

Changes to Existing tab - Results Tab

Assessment - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS

Print Spell Check Help

Assessment Name: Honda, Becky-Third Status: Open **Report** Response Time: 0 - 2 Hours Date: 02/16/2006

Participants Basic Allegations Contacts **Results**

Assessment Results

- ☐ Substantiated
- ☐ Unsubstantiated
- ☐ Pending
- ☐ Not able to locate sources
- ☐ Likely to occur
- ☐ Unlikely to occur

Family RA Future A/N

Abuse Score:
Neglect Score:
Risk Level:

Safety Assessment

Safety Decision:

Strengths and Needs

Needs Level:

Disposition

Case Disposition: Case Opened- Ongoing CPS Srvcs: Petition

Initial Assessment - Primary Caregivers Rating

Maltreatment: Circumstances: Fmly. Funct.: ☐ High (21 to 28.0)
Child Funct.: Parenting Disc.: ☐ Significant (14 to 20.9)
Adult Funct.: Parenting Gen.: Total: ☐ Moderate (7 to 13.9)
☐ Minimal to Low (0 to 6.9)

Family Service Level

Family Service Level:

Options: [Dropdown] Go Save Close

Done Local intranet

Changes to Results Tab

1. In the Disposition group box, change the Case Disposition field to a view only text field with the label "Case Disposition".
2. The field pre-fills from one of the following areas:
 - Initial Assessment Primary Caregivers > Safety Tab > Case Disposition group box > Reason field
 - Initial Assessment Secondary Caregivers > Summary Tab > Case Disposition group box > Reason Case Opened or Reason Case Closed field
 - Initial Assessment Narrative > Summary Tab > Case Disposition group box > Reason Case Opened or Reason Case Closed field

eWiSACWIS Ongoing Change Order

Changes to Existing Page - Case Closure Page

Case Closure page - Before Change

The screenshot shows the 'Case Closure - Web Page Dialog' window. The title bar includes 'Print', 'Spell Check', and 'Help' icons. The 'Basic Information' section displays 'Case Name: American, Annie', 'Case Number: 9221587', and 'Open Date: 10/24/2005'. The 'Closing Information' section has a 'Closure Status: No Request' and a 'Closed Date' dropdown. Below this are three checkboxes: 'Request For Closure?', 'Check Here If Final Safety Assessment is Not Needed', and 'Check Here If Closing Checklist is Not Applicable'. To the right of these are 'Reason:', 'Adopted By:', and 'Closing Checklist:' dropdowns. A fourth checkbox, 'Check Here If Completion of Final Family Assessment is not required', is highlighted with a red rectangle. The 'Closure Summary' section contains a text area with a red double-headed vertical arrow indicating its height. The 'Retain Case' section has fields for 'Case Name:', 'Case Number:', and 'Open Date:', followed by a 'Case Participants' text area. At the bottom, there is a 'Closure Denial Messages' section with an 'Options:' dropdown and 'Save' and 'Close' buttons.

After:

This screenshot is identical to the one above, but the checkbox 'Check Here If Completion of Final Family Assessment is not required' has been removed from the 'Closing Information' section.

Changes to Case Closure page

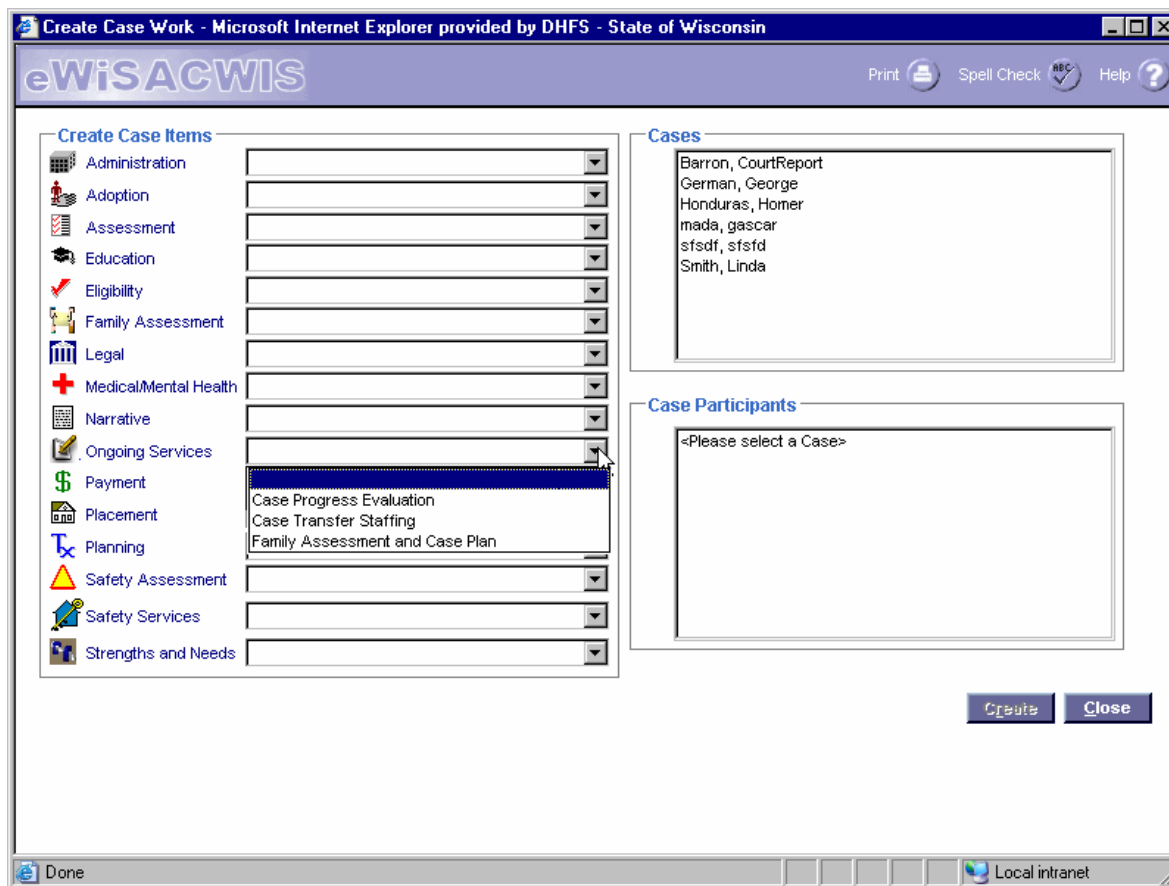
1. Remove the “Check Here if completion of Final Family Assessment if Not Applicable”.

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2. Remove the Final FA option from the Options dropdown. The Final FA option should remain available on historical case closure records.
3. Remove any case validation edits for the Final Family Assessment.
4. Increase the height of the Closure Summary text box, using space saved by removing the Final Family Assessment checkbox.

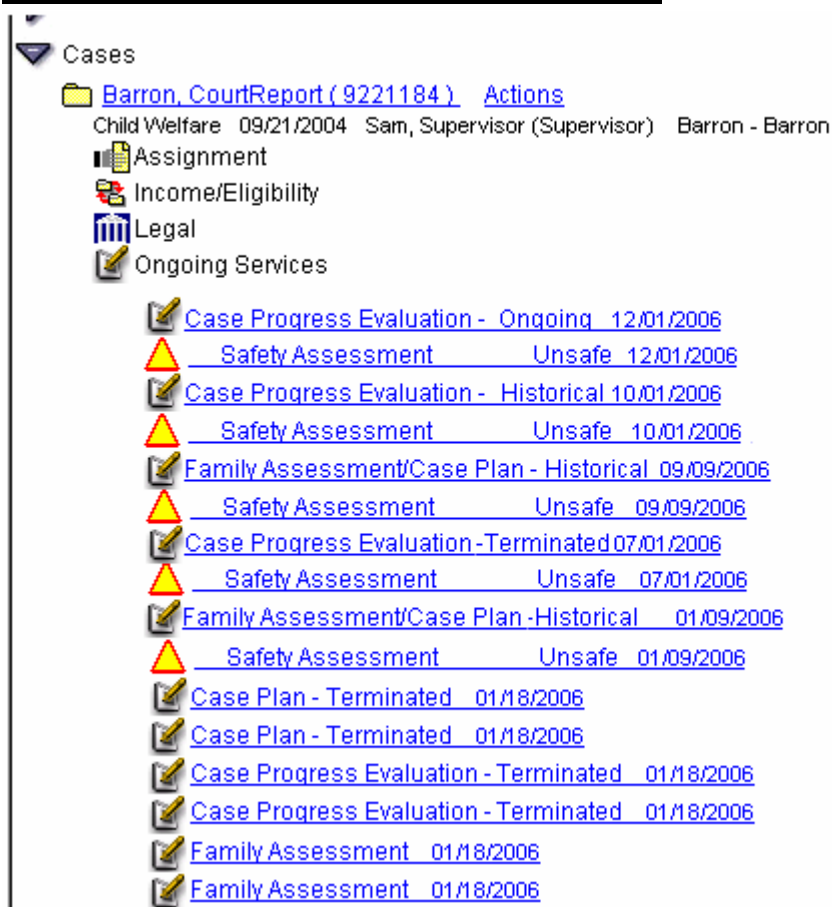
eWiSACWIS Ongoing Change Order

Changes to Existing Page – Create Case Work



1. Add "Case Progress Evaluation" and "Family Assessment & Case Plan" to the Ongoing Services dropdown.
 - Both options are case specific and case participants cannot be selected when being created.
2. Remove Case Progress Evaluation and Case Plan from the Planning dropdown.
3. Replace the Ongoing Services icon with a new icon that will be created during development.
4. Remove the Family Assessment Dropdown.

Changes to Desktop Outliner & Search Outliner



- Display the new Family Assessment & Case Plan and new Case Progress Evaluation under the Ongoing Services icon. Work should be displayed in descending order (most recent creation date to earliest creation date). Use following layout:
 - Family Assessment & Case Plan (status, approval date)
 - Case Progress Evaluation (status, approval date)
- The Safety Assessment & Planning created as part of the FA&CP or CPE will be displayed directly below the FA&CP or CPE that created it.
- Historical work (prior to release 2.4) will display below the new pages, grouped by work type and sorted in descending order by Create Date.
- The Search outliner should display the same format..
- Remove the Case Plan and Case Progress Evaluation from the Planning icon on the Desktop Cases outliner and Search outliner,
- Remove the Family Assessment icon from the Desktop Cases outliner and Search outliner.

eWiSACWIS Ongoing Change Order

Templates

Reference the template design and development documents for details.

New Templates

- Family Assessment, Case Plan & Safety Assessment
- Case Plan Summary
- Case Progress Evaluation, Safety Assessment & Case Closure
- Case Progress Evaluation Summary

Modified Templates

- Initial Assessment Narrative

Ticklers

Modified Ticklers

There will now be 2 sets of Case Progress Evaluation due ticklers. One set will have due dates calculated off of the Effective date of the Family Assessment and Case Plan or Case Progress Evaluation. The second set will calculate the due date from the Supervisory Approval date of the ongoing planning pages.

Case Progress Evaluation Tickler – 90 days from effective date

Category: Planning

Type: Case Progress Evaluation Due Tickler

Description: This tickler reminds the **primary social worker** (or supervisor, if no open primary assignment) to complete a Case Progress Evaluation 90 days from the effective date of the Case Plan or Case Progress Evaluation.

Creation: The 90 day effective date Case Progress Evaluation due tickler is created by the following processes:

1. Supervisory Approval of Family Assessment & Case Plan:

The 90 day effective date Case Progress Evaluation due tickler is generated upon supervisory approval of the Family Assessment & Case Plan when the Family Assessment & Case Plan's safety assessment decision is Unsafe. The due date for this tickler is 90 days from the effective date of the Family Assessment & Case plan.

2. Supervisory Approval of standalone Safety Assessment & Planning:

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All existing Case Progress Evaluation due ticklers are deleted and the 90 day effective date Case Progress Evaluation due tickler is generated upon supervisory approval of the Safety Assessment & Planning when the following conditions are true:

- The Safety Assessment & Planning safety decision is Unsafe
- An Ongoing Family Assessment & Case Plan or Ongoing Case Progress Evaluation exists on the case.

Any existing CPE ticklers are deleted prior to this tickler being created. The due date for this tickler is 90 days from the effective date of the last Family Assessment & Case Plan or Case Progress Evaluation.

3. Supervisory Approval of Case Progress Evaluation

All existing Case Progress Evaluation due ticklers are deleted and the 90 day effective date Case Progress Evaluation due tickler is generated upon supervisory approval of the Case Progress Evaluation when the following condition is true:

- The Case Progress Evaluation safety decision is Unsafe

The due date for this tickler is the 90 days from the effective date of the new Case Progress Evaluation.

Deletion:

The tickler can be deleted by the following processes:

- A Case Progress Evaluation has been completed and has received supervisory approval. Once this tickler has been deleted, the system will look at the safety decision to determine if Tickler A (90-day) or Tickler B (180-day) should be created.
- A standalone Safety Assessment & Planning record has received supervisory approval while an ongoing FA/CP or CPE exists.
- The ongoing need for the tickler will end once the case is closed; transferred to the adoption unit; or Terminated.

Reminder Date:

Standard setting: the worker should receive the tickler 69 days after the effective date of the Family Assessment & Case Plan or Case Progress Evaluation or 21 days prior to the tickler due date.

First Escalation Date:

Standard setting: the tickler will always escalate to the worker's supervisor at the 90 day due date.

Second Escalation Date:

None

Case Progress Evaluation Tickler – 180 days from Effective date

Category:

Planning

Type:

Case Progress Evaluation Due Tickler

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Description:	This tickler reminds the primary social worker (or supervisor, if no open primary assignment) to complete a Case Progress Evaluation 180 days from the effective date of the Family Assessment & Case Plan or Case Progress Evaluation.
Creation:	<p>The 180 day effective date Case Progress Evaluation due tickler is created by the following processes:</p> <ol style="list-style-type: none">1. Supervisory Approval of Family Assessment & Case Plan:<p>The 180 day effective date Case Progress Evaluation due tickler is generated upon supervisory approval of the Family Assessment & Case Plan when the Family Assessment & Case Plan's safety assessment decision is Safe. The due date for this tickler is 180 days from the effective date of the Family Assessment & Case Plan. This tickler reminds the primary social worker to complete a Case Progress Evaluation every 180 days.</p>2. Supervisory Approval of standalone Safety Assessment & Planning:<p>All existing Case Progress Evaluation due ticklers are deleted and the 180 day effective date Case Progress Evaluation due tickler is generated upon supervisory approval of the standalone Safety Assessment & Planning when the following conditions are true:</p><ul style="list-style-type: none">• The standalone Safety Assessment & Planning safety decision is Safe• An Ongoing Family Assessment & Case Plan or Ongoing Case Progress Evaluation exists on the case.<p>Any existing CPE due ticklers are deleted prior to this tickler being created. The due date for this tickler is 180 days from the effective date of the last Family Assessment & Case Plan or Case Progress Evaluation.</p>3. Supervisory Approval of Case Progress Evaluation<p>All existing Case Progress Evaluation due ticklers are deleted and the 180 day effective date Case Progress Evaluation due tickler is generated upon supervisory approval of the Case Progress Evaluation when the following condition is true:</p><ul style="list-style-type: none">• The Case Progress Evaluation safety decision is Safe<p>The due date for this tickler is 180 days from the effective date of the new Case Progress Evaluation.</p>
Deletion:	<p>The tickler can be deleted by the following processes</p> <ul style="list-style-type: none">• A Case Progress Evaluation has been completed and has received supervisory approval. Once this tickler has been deleted, the system will look at the safety decision to determine if Tickler A (90-day) or Tickler B (180-day) should be created.

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- A standalone Safety Assessment & Planning record has received supervisory approval while an ongoing FA/CP or CPE exists.
- The ongoing need for the tickler will end once the case is closed; transferred to the adoption unit; or Terminated.

Reminder Date: Standard setting: the worker should receive the tickler 60 days prior to the tickler due date.

First Escalation Date: Standard setting: the tickler will always escalate to the worker's supervisor 45 days prior to the tickler due date.

Second Escalation Date: At the 180-day due date.

Case Progress Evaluation Tickler – 90 days from Approval date

Category: Planning

Type: Case Progress Evaluation Due Tickler

Description: This tickler reminds the **primary social worker** (or supervisor, if no open primary assignment) to complete a Case Progress Evaluation 90 days from the approval date of the Case Plan or Case Progress Evaluation.

Creation: The 90 day approval date Case Progress Evaluation due tickler is created by the following processes:

1. Supervisory Approval of Family Assessment & Case Plan:

The 90 day approval date Case Progress Evaluation due tickler is generated upon supervisory approval of the Family Assessment & Case Plan when the Family Assessment & Case Plan's safety assessment decision is Unsafe. The due date for this tickler is 90 days from the approval date of the Family Assessment & Case plan.

2. Supervisory Approval of standalone Safety Assessment & Planning:

All existing Case Progress Evaluation due ticklers are deleted and the 90 day approval date Case Progress Evaluation due tickler is generated upon supervisory approval of the Safety Assessment & Planning when the following conditions are true:

- The standalone Safety Assessment & Planning safety decision is Unsafe
- An Ongoing Family Assessment & Case Plan or Ongoing Case Progress Evaluation exists on the case.

Any existing CPE ticklers are deleted prior to this tickler being created. The due date for this tickler is 90 days from the approval date of the last Family Assessment & Case Plan or Case Progress Evaluation.

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3. Supervisory Approval of Case Progress Evaluation

All existing Case Progress Evaluation due ticklers are deleted and the 90 day approval date Case Progress Evaluation due tickler is generated upon supervisory approval of the Case Progress Evaluation when the following condition is true:

- The Case Progress Evaluation safety decision is Unsafe

The due date for this tickler is the 90 days from the approval date of the new Case Progress Evaluation.

Deletion:

The tickler can be deleted by the following processes:

- A Case Progress Evaluation has been completed and has received supervisory approval. Once this tickler has been deleted, the system will look at the safety decision to determine if Tickler A (90-day) or Tickler B (180-day) should be created.
- A Safety Assessment & Planning record has received supervisory approval while an ongoing FA/CP or CPE exists.
- The ongoing need for the tickler will end once the case is closed; transferred to the adoption unit; or Terminated.

Reminder Date:

Standard setting: the worker should receive the tickler 69 days after the approval date of the Family Assessment & Case Plan or Case Progress Evaluation or 21 days prior to the tickler due date.

First Escalation Date:

Standard setting: the tickler will always escalate to the worker's supervisor at the 90 day due date.

Second Escalation Date:

None

Case Progress Evaluation Tickler – 180 days from Approval date

Category:

Planning

Type:

Case Progress Evaluation Due Tickler

Description:

This tickler reminds the **primary social worker** (or supervisor, if no open primary assignment) to complete a Case Progress Evaluation 180 days from the approval date of the Family Assessment & Case Plan or Case Progress Evaluation.

Creation:

The 180 day approval date Case Progress Evaluation due tickler is created by the following processes:

1. Supervisory Approval of Family Assessment & Case Plan:

The 180 day approval date Case Progress Evaluation due tickler is generated upon supervisory approval of the Family Assessment & Case Plan when the Family Assessment & Case Plan's safety assessment decision is Safe. The due date for this tickler is 180 days from the approval date of the Family Assessment & Case

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Plan. This tickler reminds the primary social worker to complete a Case Progress Evaluation every 180 days.

2. Supervisory Approval of standalone Safety Assessment & Planning:

All existing Case Progress Evaluation due ticklers are deleted and the 180 day approval date Case Progress Evaluation due tickler is generated upon supervisory approval of the standalone Safety Assessment & Planning when the following conditions are true:

- The standalone Safety Assessment & Planning safety decision is Safe
- An Ongoing Family Assessment & Case Plan or Ongoing Case Progress Evaluation exists on the case.

Any existing CPE due ticklers are deleted prior to this tickler being created. The due date for this tickler is 180 days from the approval date of the last Family Assessment & Case Plan or Case Progress Evaluation.

3. Supervisory Approval of Case Progress Evaluation

All existing Case Progress Evaluation due ticklers are deleted and the 180 day approval date Case Progress Evaluation due tickler is generated upon supervisory approval of the Case Progress Evaluation when the following condition is true:

- The Case Progress Evaluation safety decision is Safe

The due date for this tickler is 180 days from the approval date of the new Case Progress Evaluation.

Deletion:

The tickler can be deleted by the following processes

- A Case Progress Evaluation has been completed and has received supervisory approval. Once this tickler has been deleted, the system will look at the safety decision to determine if Tickler A (90-day) or Tickler B (180-day) should be created.
- A standalone Safety Assessment & Planning record has received supervisory approval while an ongoing FA/CP or CPE exists.
- The ongoing need for the tickler will end once the case is closed; transferred to the adoption unit; or Terminated.

Reminder Date:

Standard setting: the worker should receive the tickler 60 days prior to the tickler due date.

First Escalation Date:

Standard setting: the tickler will always escalate to the worker's supervisor 45 days prior to the tickler due date.

Second Escalation Date:

At the 180-day due date.

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New Ticklers

Family Assessment & Case Plan Due

Category: Planning

Type: Family Assessment & Case Plan Due

Description: This tickler reminds the **primary social worker** (or supervisor, if no open primary assignment) to complete a Family Assessment & Case Plan 60 days after an Initial Assessment with an unsafe safety decision is approved.

Creation: The Family Assessment & Case Plan Due tickler is created upon supervisory approval of the Initial Assessment with a Safety Assessment Safety decision of “Unsafe” and a Disposition of one of the following four values: Case Opened-Ongoing CPS Svcs: Vol; Case Opened-Ongoing CPS Svcs: Petition; Case Already Opened-Ongoing CPS Svcs: Vol ; Case Already Opened-Ongoing CPS Svcs: Ptn

When an approved Initial Assessment meets the above conditions, the system will verify whether any ongoing Family Assessment & Case Plans or ongoing Case Progress Evaluations exist on the case. If yes, the tickler will not be created. If none exist, the system will look for any pre-existing Family Assessment & Case Plan Due ticklers, and if none exist the tickler will be created. The tickler should not be created if there is currently a Family Assessment & Case Plan tickler for the Case.

Deletion: The tickler can be deleted by the following processes

1. A Family Assessment & Case Plan is created and receives supervisory approval with the status of Ongoing.
2. The case is closed; or transferred to the adoption unit.

Reminder Date: Standard setting: the worker should receive the tickler 21 days prior to the tickler due date.

First Escalation Date: Standard setting: the tickler will always escalate to the worker’s supervisor 7 days prior to the tickler due date.

Second Escalation Date: At the 60-day due date.

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Reference Data

- Add new CODE_DESC values for the following Goal Statuses:
 - Achieved
 - Continue Current Goal
 - No Longer Applicable
 - Revised Goal/Service/Activity/Service Provider
- Add Case Plan Services

Alternate Care Services	Independent Living
AODA Assessment	Juvenile Justice Services/Activities
AODA Treatment	Medical/Dental Services
Basic Home Management	Mental Health Assessment
Case Management Services	Mental Health Treatment
Counseling	Parenting Services
Educational Assessment/Services	Probation & Parole Services
Educational Assessment/Services	Recreational Activities
Daycare	Respite
Developmental Assessment	Social/Emotional Support
Family Interaction	Specialized Medical/Care Services
Housing Assistance	Transportation

Security Changes

Standard (level 1-2) security should be added for the new Family Assessment & Case Plan and Case Progress evaluation pages.

Database Changes

The Database schema will be finalized during the development phase. New tables will be created for the Family Assessment & Case Plan and Case Progress Evaluation.

The modifications to the Initial Assessment Narrative will require additional DOC_NARRATIVE codes to be created.

Reports

New Reports:

- No new reports will be created as part of this change order design.

Modified Reports:

- Report SM0801 – See Report Design Documentation for details

eWiSACWIS Ongoing Change Order

Approval Management

The Approval Management page must be modified to allow for the Approving of Family Assessment & Case Plans and Case Progress evaluations.

eWiSACWIS Anywhere

Changes to the Initial Assessment-Primary Caregivers and Initial Assessment - Narrative must be included in the Tablet PC application, eWiSACWIS Anywhere.

Batch Modifications

The following batch programs must be modified as a result of changes made in this change order:

Archive Case Batch

Summary: The Archive Case batch moves cases to a separate archival storage area after a case has been closed for at least 5 years. Once a closed case has been archived, data within that case will be moved to a separate storage area except for the case “stub” record and the associated case participants.

Modification needed: The batch should be modified to include archiving of new tables created for the Family Assessment & Case Plan and Case Progress Evaluation. The batch should also archive the new DOC_NARRATIVE records associated with the new Ongoing Tables and with Initial Assessment Narrative.

Person Delete

Summary: This program deletes all records associated with persons scheduled for deletion. The persons are identified by a ‘D’ value for the person status code. The batch looks for the person id on a set of tables and if person id is found the deletion will not be allowed.

Modification needed: Update the batch to include looking up person id in newly created tables for Family Assessment & Case Plan and Case Progress Evaluation. If the id is found to be associated with these new tables, do not allow the delete to process.

Person Merge

Summary: Currently, the batch process involves checking every table that exists with a Person ID, and replacing the remove person ID with the keep person ID.

Modification needed: The batch must be modified to update person ID with the keep person id on the newly created tables for Family Assessment & Case Plan and Case Progress Evaluation.

Case Closure

Summary: This program checks cases for which a closure request has been submitted to determine whether or not the closure should proceed. It processes case records from the Case Closure Table that have a status of Requested or Closure Request Denied. For each case, the program checks for any items that have not received final approval and plans that have status of Ongoing. If open items or Ongoing plans are found, the Case Closure status is updated to Closure Request Denied and the closure process cannot proceed.

eWiSACWIS Ongoing Change Order

Modification needed: The Case Closure batch must be modified so that case closure is denied when the Family Assessment & Case Plan or Case Progress Evaluation pieces of work have not received final supervisory approval or are in Ongoing or Pending status. The batch should continue to verify that the old pieces of work are approved and not in Ongoing or Pending status.

Case Merge

Summary: Combines cases that have been scheduled and approved for merging, using the Case Closure Page and the approval process. The program processes all records marked with a Merge code in the Case Closure Table. Each record marked for Merge has a designated Remove Case and Retain Case. All records for the Remove Case are transferred into the Retain Case.

Modification needed: When transferring records into the Retain Case include records from newly created tables for Family Assessment & Case Plan and Case Progress Evaluation. The batch should also transfer the new DOC_NARRATIVE records associated with the new Ongoing Tables and with Initial Assessment Narrative.

TPR Copy

Summary: When TPR is granted for a child, the child's case work and adoption referral must move with the child to the new TPR Case. This batch process moves casework from the original to the TPR Case.

Modification needed: Update the TPR Copy batch to include copying of newly created tables for Family Assessment & Case Plan and Case Progress Evaluation associated with the TPR'd child. The batch should also copy the new DOC_NARRATIVE records associated with the new Ongoing Tables and with Initial Assessment Narrative.

Case Part Remove

Summary: The purpose of this batch process is to remove a participant from one particular case. It will first scan the CASE_PART Table for records with CD_STAT = 'R'. For each record found, retain the ID_PRSN and ID_CASE from these records to edits to ensure no work had been created for the case participant in the case.

Modification needed: The batch should include the newly created tables for Family Assessment & Case Plan and Case Progress Evaluation when checking for work associated with the person flagged for removal.

Plan for Preexisting Ongoing Work and Ticklers

Any Pending Family Assessments, Case Plans or Case Progress Evaluations from prior to release 2.4 will be available and editable. Workers will be able to complete and approve the work. No additional work using old screens can be started. Workers with Ongoing Case Plans will have to create new Family Assessment & Case Plan records prior to completing the Case Progress Evaluation.

If a worker has an ongoing Case Plan when they create the new Family Assessment & Case Plan, the Ongoing Case Plan will be made Historical immediately upon creation of the new work.

eWiSACWIS Ongoing Change Order

None of the information from the old version of the plan will copy into the new Family Assessment & Case Plan.

If a worker has an old pending Family Assessment or an old pending Case Plan when they attempt to create a new Family Assessment & Case Plan, the system will display the following message: “A Pending Family Assessment & Case Plan exists for the specified case. Please access it via the Cases outliner”

Pre-existing ticklers that were generated off of old Case Plans and Case Progress Evaluations should be deleted when any new Case Progress Evaluation ticklers are created.